DOCUMENT RESUME

ED 120 611 CG 010 440

TITLE Guidance Management Model: Planning and Program Development, Need Assessment, Monitoring and Evaluation, Budgeting and Control.
INSTITUTION Peat, Marwick, Mitchell and Co., Philadelphia, Pa.
SPONS AGENCY Pennsylvania State Dept. of Education, Harrisburg. Bureau of Instructional Support Services.
PUB DATE [19 Dec 75]
NOTE 161p.; Presented at the Annual Convention of the North Atlantic Regional Association for Counselor Educators and Supervisors (Kaimesha, New York, October 7-9, 1975)

EDRS PRICE MF-$0.83 HC-$8.69 Plus Postage
DESCRIPTORS Evaluation Methods; Guidance Functions; *Guidance Programs; *Management Systems; Models; *Needs Assessment; Program Descriptions; *Program Development; *Program Planning; Public Schools; Speeches
IDENTIFIERS *Pennsylvania

ABSTRACT

This manual describes a guidance management system which utilizes techniques necessary to identify, plan, implement, control, and assess guidance program activities and services in relation to the school district's changing needs and guidance policy formulation. To be responsive to existing contraints and potentialities within the public school system the management system undertook to 1) plan and organize to collect and analyze information on the existing guidance delivery system and organization; 2) determine general parameters of the planning, control and evaluation functions of the management design; and 3) specify organizational structure to accommodate the assignment of responsibilities and decision-making. The manual discusses the components of the guidance management system as they relate to policy formulation and management, and describes how these components (needs assessment, program development and budgeting, program operations and monitoring, and program evaluation) are operationalized through the techniques of developing a guidance program structure, formulating goals and objectives, conducting program analysis, and collecting and reporting guidance program information. (Author/SJL)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED120611

PENNSYLVANIA DEPARTMENT OF EDUCATION

BUREAU OF INSTRUCTIONAL SUPPORT SERVICES

GUIDANCE

PLANNING AND PROGRAM DEVELOPMENT

MANAGEMENT

NEEDS ASSESSMENT • MONITORING AND EVALUATION

MODEL

BUDGETING AND CONTROL

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

CG010490

PMM&Co. Peat, Marwick, Mitchell & Co.

PEAT, MARWICK, MITCHELL & CO.
CERTIFIED PUBLIC ACCOUNTANTS
1500 WALNUT STREET
PHILADELPHIA, PA. 19102

December 19, 1975

Mr. John Christopher, Director
Bureau of Instructional Support Services
Pennsylvania Department of Education
Commonwealth of Pennsylvania
Box 911
Harrisburg, Pennsylvania 17126

Dear Mr. Christopher:

Peat, Marwick, Mitchell & Co. (PMM&Co.) has completed the design and implementation of a guidance program management system for Bristol Township School District (BTSD). As you are aware, the principal consideration of our assistance was to design, in an experimental setting (BTSD), a guidance program management system that within the Bureau of Instructional Support Services (BISS) could partially or totally adapt to other school districts within the Commonwealth.

In our opinion, the guidance management system which we designed, can be partially or fully implemented depending on the needs and capabilities of the selected school district.

The contents of this report are directed toward the following aims, namely: (1) provide BISS with a methodological framework to better assist local school districts in planning, managing and assessing guidance program activities; and (2) describe the results of our assistance to BTSD in the development and adaptation of a guidance management system in a local school setting.

OUR APPROACH

A major a priori consideration in designing the guidance management system was to develop a viable structure which:

- enables providers and users of guidance services to articulate their needs and expectations relative to a district-wide guidance program;
- organizes guidance/counseling functions by logically grouping interdependent activities into a program structure arrangement;
- permits flexibility in adjusting to new guidance needs and services;
- provides a results oriented budgeting system that accounts for expenditures according to program outputs; and
- evaluates guidance programs annually according to pre-determined goals and objectives.

The process we developed to govern and review our assistance consisted of organizing school district personnel to: (1) respond to our findings and conclusions and (2) approve of our recommendations. Accordingly, a user group comprised of pupils, parents, employers and teachers was organized to review and comment on our assistance activities as they related to our assessment and conclusions about the existing guidance program at BTSD. Similarly, we organized a group of school administrators (e.g., assistant superintendent, BISS representative, principal, board member and pupil personnel director) to reject, modify or approve recommendations resulting from our conclusions.

Additionally we organized three task forces composed of principals and counselors representing elementary, middle and high schools. Their function was to develop with our assistance, goals/objectives and a logical grouping of guidance activities which were supportive of the goal/objective statements.

Given the above-mentioned organizational grouping our assistance activities concentrated on extensive data collection and analysis of the BTSD's current guidance program. Based on the foregoing, we then designed the structure and functions of the guidance management system which:

- serves as a model to guide BISS in assisting local school districts to better plan, manage and evaluate guidance program activities; and

- provides BTSD with a structure and methodology to plan, implement, control and evaluate its guidance program vis a vis changing needs of guidance service beneficiaries in the public school environment.

The discussion which follows describes summarily what we believe are the significant results of our assistance in designing a guidance management system.

A MODEL TO GUIDE BISS IN ASSISTING LOCAL SCHOOL DISTRICTS

In designing and implementing a guidance management system, it is essential to be knowledgeable of the local school districts' existing organizational, programmatic, legal and administrative constraints. Since constraints may influence structure, functions and processes of the newly designed system, a fact-finding effort should be undertaken to identify the nature and extent of these constraints.

Constraints Identification

The following tasks should be undertaken to identify potential or existing constraints.

- Review of pertinent documents concerned with (1) counselor job descriptions, (2) professional handbooks, (3) service procedures, (4) program philosophy and objectives, (5) staffing arrangements, (6) survey data, (7) employees agreements and (8) data processing services.

- Research recent management concepts and literature on public school guidance services, which include reviews of professional publications, textbooks and evaluation materials.

- Interview Federal, State and relevant university representatives about guidance legislation and current management and evaluation trends in the guidance field.

- Interview providers and users of guidance services; such as school board members, parents, pupils, school administrators, counselors, local employers, community agencies and post-secondary institutions.

After a thorough fact-finding effort, the collected data should be analyzed by relating specifically the identifiable constraints to the existing [illegible]al situation.

Analysis of Findings

An analysis of findings includes but is not limited to:

- defining the organization of the guidance program in the total school setting focusing such factors as: (1) line and staff reporting relationships, (2) responsibility assignments and (3) decision-making processes; and
- determining how the guidance program actually operates as compared to the perceptions and expectations of users and providers of guidance services; and
- specifying strengths and weaknesses in guidance program activities and service delivery system; especially with respect to: (1) clarity and specificity of program goals and objectives, (2) coordination of counseling services with external and internal users of the program, (3) physical location of counseling facilities to ascertain whether proximity of counselor added to or detracted from counselor effectiveness and (4) adequacy of district's methods in evaluating guidance program and counselor performance; and
- assessing operational activities which may affect, positively or adversely, the efficiency of the counseling function placing emphasis upon: (1) extent of counselor's clerical responsibilities, (2) counselor's recordkeeping procedures and reporting requirements, (3) counselor's caseloads by type and ratio to pupil enrollment and (4) quality and provision of in-service training and/or staff development for counselors.

Following data collection and analysis is the design of the general parameters of the guidance management system. The focal point of this phase is to develop conceptually the structure and functions of the system as they relate to management processes of planning, controlling and evaluating. Essentially, the developmental phase consists of goals/objectives formulation and refinement and development of a guidance program structure.

Goals/Objectives Formulation

The role of the previously mentioned task forces was integral to the process of formulating guidance program goals and objectives. PMM&Co.'s role was not to develop goals and objectives for the district. Rather, our major responsibility was to assist task force personnel in the process of goal and objective development. This assistance involved reviewing goal/objective statements to make certain that they are interrelated and supportive of each other, and contain measureable and quantitative attributes.

Program Structure

The guidance program structure is developed through analyzing current and planned program activities in relationship to goals and objectives. Within context of that purpose, the local district should classify in a hierarchical order logically grouped and interdependent guidance activities. Our role therefore was to assist BTSD personnel in making certain that their new or revised guidance activities were responsive to the program's goals and objectives.

Guidance Management System

The thrust of designing a guidance management system must focus:

- management functions that are interrelated and supportive of the guidance goals/objectives and program structure,
- a continuous flow of information which provides feedback on program operations,and
- an organization which facilitates decision-making and efficiently coordinates human resources.

In addressing the management functions, emphasis must be directed toward integrating the processes of: (1) needs identification as it relates to goals/objectives determination, (2) program development and budgeting with regard to associating program activities and objectives and allocating resources to implement activities, (3) operations and monitoring to control program activities and manage resources efficiently,and (4) evaluation to assess extent of goal/objective achievement and service delivery performance.

Integral to management functions is the need to develop the capability to capture and process information relevant to the status of program operations. Accordingly, an information system must be designed to collect and report data relevant to the status of program operations. The routine flow of information is the common bond which sequentially links the program management functions.

We believe that the organizational structure of the system rationalizes the relationship of the guidance program within the total public school structure. Therefore, it provides a mechanism to clearly delineate roles, functional responsibilities and reporting relationships. In designing the organization at BTSD, we recognized a need to recommend a full-time guidance coordinator responsible for administering the guidance management system. The decision-making process as it relates to the execution of policy and planning of guidance activities is participatory and should include inputs from both users and providers of guidance services. Operating decisions, particularly at the school building level, should be vested in the principal.

Regarding decisions in the development of policy, the organization of the guidance management system should provide a structure to include participation of the guidance coordinator, building principals, board members and the superintendent or his designee.

In conclusion, we believe that the methods and procedures embodying our approach to this engagement can be replicated and adapted to local school district guidance programs throughout the Commonwealth. Furthermore since

BTSD was selected as the pilot district for this project, we believe that the school district derived substantial benefits. Specifically, the participation of BTSD's school officials has familiarized them with the design processes sufficiently enabling them to operationalize and refine the management system so that it is responsive to the district's guidance needs.

For your convenience and ease in understanding the text of this study, the report is divided into the following sections.

I - Background Information

II - Scope and Objectives of the Study

III - Components and Concepts of Guidance Management System

IV - Description and Documentation of Management Model

V - Guidance Information and Reporting System

VI - Areas of Concern in Implementing the Guidance Management System

To augment the report we have included graphic illustrations (labeled as Figures) in Sections III through V. Also, appended to the report are: (1) reporting forms including instructions on how to complete them and (2) BTSD's goals, objectives and program structure. Both supplements are denoted as Appendix A and B, respectively.

* * * * *

We wish to extend our thanks and gratitude to you and BISS staff in cooperating and supporting us throughout this very challenging project.

Additionally, we express appreciation for the dedicated commitment on the part of BTSD personnel. The unselfish time and effort which they devoted were vital contributions in making this a successful project.

Very truly yours,

Peat, Marwick, Mitchell + Co.

TABLE OF CONTENTS

I - BACKGROUND INFORMATION I-1

The BISS Perception of the Problem I-1

Guidance and the Local Education Process I-2
  Organization I-3
  Duties and Responsibilities of Counselors I-3
  Procedures for Reporting on Counseling Activities I-4
  Program and Counseling Activities I-4
  Evaluation of Counselor Performance I-6
  Counseling Caseload I-6

II - SCOPE AND OBJECTIVES OF THE STUDY II-1

Objectives of the Study II-1

Scope of Our Assistance II-3

III - COMPONENTS AND CONCEPTS OF GUIDANCE MANAGEMENT SYSTEM III-1

Component Groups of the Management System III-2
  Program Coordinator III-2
  User Group III-3
  Program Development Task Forces III-4
  Policy Planning Group III-6

Basic Management System Concepts III-6
  Program Structure III-6
  Goals III-8
  Objectives III-10
  Program Analysis III-12
  Program Budgeting III-12

IV - DESCRIPTION AND DOCUMENTATION OF MANAGEMENT MODEL IV-1

Phase I: Needs Survey IV-1

Phase II: Program Development and Budgeting IV-3

Phase III: Program Operation and Monitoring IV-16

Phase IV: Evaluation IV-21
  Collection and Analysis of Data IV-22
  Providing Information for Decision Alternatives IV-25

V - GUIDANCE INFORMATION AND REPORTING SYSTEM V-1

Phase I: Needs Survey V-2

Phase II: Program Development and Budgeting V-2

Phase III: Program Operation and Monitoring V-6

Phase IV: Evaluation V-9

VI - AREAS OF CONCERN IN IMPLEMENTING THE GUIDANCE MANAGEMENT SYSTEM VI-1

Fact-Finding VI-1
    Existing Guidance Services and Organization VI-1
    Constraint Analysis VI-2

Objective Concept VI-4

Budgeting VI-5

Commitment VI-6
    Building Principals VI-6
    Guidance Program Coordinator VI-7

ILLUSTRATIONS

Figure 1: Interrelationship of Guidance
    Service Community . . . . Facing Page III-4

Figure 2: Typical Guidance Program Structure . . . . . Facing Page III-8

Figure 3: Pilot District Guidance Services Matrix
    (Using Model Program Structure) . . . . . . Facing Page III-9

Figure 4: Sample Section of Goal Hierarchy . . . . . . Facing Page III-11

Figure 5: Guidance Management Model . . . . Facing Page IV-1

Figure 6: Phase I - Needs Survey . . . . Facing Page IV-2

Figure 7: Guidance/Counseling Services
    Community Needs Survey (By Mail) . . . . . Facing Page IV-3

Figure 8: Phase II - Program Development
    and Budgeting . . . . Facing Page IV-4

Figure 9: Program Budget . . . . Facing Page IV-9

Figure 10: Program Account Structure Codes . . . . Facing Page IV-13

Figure 11: Phase III - Program Operation
    and Monitoring . . . . Facing Page IV-16

Figure 12: Phase IV - Evaluation . . . . Facing Page IV-21

Figure 13: Guidance Information and
    Reporting System . . . . Facing Page V-1

APPENDIX

Figures 7, 9, and 14 Through 25: Reporting Forms and Instructions . A

Bristol Township School District's Goals, Objectives and
  Program Structure . . . . B

I - BACKGROUND INFORMATION

Over the past decade instructional support programs have come under closer scrutiny by school boards, particularly during periods of budgetary uncertainty. In many instances, the value of guidance, as a support service program, tends to be the object of board members' skepticism. Questions about guidance's value in the school setting, when reinforced by the fact that the benefits of counseling services tend to be long-term and difficult to measure objectively, indeed suggest that guidance might be subjected to budget cuts.

This increasingly common viewpoint of guidance has indicated to administrators of guidance services that they must begin to develop greater accountability of the delivery and results of guidance services.

According to the Pennsylvania Department of Education's Bureau of Instructional Support Services (BISS), what guidance programs need to address these problems is a management system that provides administrators with the capability to plan, control and evaluate the delivery of counseling services.

THE BISS PERCEPTION OF THE PROBLEM

The Bureau of Instructional Support Services (BISS) has sought to assist local school districts in upgrading the levels of professionalism and effectiveness of guidance programs. BISS's assistance has consisted of providing:

- Title III (Elementary and Secondary Education Act) grants for local districts to develop in-service training programs for counselors and introduce innovative guidance projects to augment existing guidance services;
- staff to assist local guidance personnel in planning and implementing special guidance projects such as career and group counseling; and

- staff direction and support in designing evaluative methods/approaches to assess the delivery of guidance services and program effectiveness.

Since the Commonwealth of Pennsylvania has no mandatory guidance program for local school districts, virtually all districts have developed various levels of guidance services in accordance with resources they desire to budget for the program. As a result of these different levels of resource allocation, there is little uniformity among programs at the local level, particularly in areas such as:

- organization of guidance programs,
- responsibilities of guidance personnel,
- management of guidance functions, and
- functions and priorities of the guidance program.

BISS, as principal resource for assisting local guidance programs, found it difficult to assess the results of its assistance when faced with variations and non-uniformity of guidance functions among local school systems. Although program functions are different because of each district's peculiar guidance needs, BISS recognized that guidance programs need a system for documenting and reporting program outcomes to the public and other professionals.

GUIDANCE AND THE LOCAL EDUCATION PROCESS

The increasingly complex environment in which pupils develop and interact necessitates that a guidance program must be an integral part of the total education process. If the program is loosely controlled and coordinated, the utility of guidance services will diminish.

At the pilot district our analysis of interview findings obtained from users of guidance services (e.g., teachers, parents, pupils, local employers) and counselors indicated that the guidance program suffered from an image problem. Specifically, the program lacked clarity as to its function within the district's educational process. As a result users of guidance services tended to be uncertain about the utilitarian value of counseling; counselor responsibilities tended to be a function of a building principal's perception of the counseling function; the relationship of guidance services and counseling activities were coordinated loosely; and there were divergent views about a counselor's accountability.

We summarize below a few of the significant problem areas which affected the operation and utilitization of guidance at the pilot district. A more definitive discussion of our findings on the pilot district's guidance program is presented in our October 25, 1974 progress report.

Organization

The guidance function was difficult to isolate for analysis because of overlapping line and staff reporting relationships and duplicatory responsibility assignments in the overall district organization. Unlike other support services within the Division of Pupil Personnel Services, there was no assigned supervisor responsible for intradistrict coordination of the guidance program. This responsibility is assumed by the director of that division.

Reporting relationships were inconsistent in that some counselors believed they reported to the school principal, while others viewed their immediate superior as being either the director of pupil personnel services or counselor chairperson.

Duties and Responsibilities of Counselors

The most recent job descriptions for counselors were dated 1969. With the exception of one high school the majority of counselors interviewed were unaware of the content of their job descriptions. Additionally, divergent views were held by both teachers and counselors as to what should be the job duties and objectives of counselors.

Procedures for Reporting on Counseling Activities

Guidance counselors prepare brief monthly reports of their activities. The reports are then summarized by the counselor chairperson and sent to the school principal who forwards them to the Director of Pupil Personnel Services, the Director of Secondary Education, and others. Each middle and secondary school principal determines the format and content of the report. (Elementary school counselors submit their reports directly to the Director of Pupil Personnel Services, who establishes their format.)

Typical report items include:

- entrances/withdrawals;
- number and type of counseling contacts;
- number and type of referrals;
- pupil logistical data;
- meetings with administrators;
- scheduling;
- professional conferences; and
- transcript requests.

Due to the lack of uniform formats for all schools, it was impossible to summarize key activities on a district-wide basis.

Program and Counseling Activities

Although the district's documentation contained guidance philosophy and objectives, such documents were not reviewed or updated regularly. Also, formal statements of guidance philosophy and objectives were not tailored to individual schools in the district to reflect a school's specific guidance services and related counseling activities. This disjointedness between program objectives and counseling activities obviates effective procedures to evaluate the district's guidance program.

We observed that coordination of guidance program activities was structured loosely, particularly with respect to: (1) the continuity of counseling services when a pupil changes schools and (2) operating linkages between district's guidance activities and users of guidance services (e.g., local employers, post-secondary educational institutions and parents). Closely related to the latter was the complaint of teachers and pupils about the lack of an organized program to prepare students for work opportunities and higher education after graduation.

Regarding counseling activities, counselors expressed concern about the inordinate amount of time which they had to devote to clerical functions. In their view, the efficient and effective delivery of counseling services was impeded by their excessive involvement with administrative paperwork. Consequently, counseling activities mainly involved assisting students with crisis problems, such as dropping out of school, pregnancy, etc. This counseling role influenced the students' perceptions of the counselor. For example, although students who have serious problems should seek counseling assistance, student interviewees stated that the role of the counselor as a crisis interventionist made the average student (especially in the middle schools) reluctant to seek a counselor's assistance on academic problems or career guidance.

Evaluation of Counselor Performance

Principals and counselors indicated that current evaluation methods of counselors were inadequate. The evaluation form utilized to assess counselor performance was the standard form used for teachers; moverover, the assessment criteria were inappropriate for counseling. Because of an inadequate evaluation instrument to assess counselor performance, counselors received minimal feedback as to the quality and impact of their service activities.

Counseling Caseload

According to the Title III (ESEA) Office in the U. S. Office of Education (USOE), the general "rule of thumb" recommendation for secondary student to counselor caseload is one counselor to every 350 students. Bristol Township statistics for the 1973-74 school year show an average high school caseload of one counselor to 434 students and an average middle school caseload of one counselor to 344 students.

In general, according to USOE, the ratio of students to counselors would increase at lower grade levels, because of differences in the counselor's role. Fewer counselors are needed at the middle and particularly the elementary levels because other pupil personnel workers (e.g., psychologists, psychometrists, speech clinicians) often assist with the diagnostic role of the counselor at those levels. On the other hand, high school counseling is generally regarded as a necessary and helpful element in the proper career decisionmaking of all secondary students--the goal being to reach and counsel effectively every student during his high school years.

Based on the foregoing problem areas and other detailed findings, we concluded that the design of a guidance management system would have to embody concepts that: (1) clearly establish organization and function of the guidance program, (2) unquestionably convey to both users and providers the purpose, objectives and results of the guidance program; and (3) rationally provide a coordinative interface among the essential program functions of planning, controlling and evaluating the delivery of guidance services.

II - SCOPE AND OBJECTIVES OF THE STUDY

To design and implement a program management system for guidance, PMM&Co. defined the guidance function and mated it with an appropriately and demonstrably proven management model. Our approach was guided by the following assumptions.

- The effectiveness of a particular guidance function cannot be definitively measured (if at all) over a short time period. Therefore, some method must be available to determine, at reasonably short and discrete intervals (e.g., annually or semiannually) whether or not the program is meeting its short-interval goals.
- Constantly changing priorities among competing goals/objectives require the capability to modify the evaluation instrument/process within the broad framework of the general management model.
- The introspective nature of "success" in the guidance function requires some interactive method of evaluation between administrators and the counselors.
- Introductions of new or revised methodologies must be done within a general evaluative framework, consistent with the capabilities of available resources.

While we duly recognized these assumptions as potential constraints, they clearly set forth our study objectives and scope of assistance in designing and implementing a guidance management system at Bristol Township School District (BTSD).

OBJECTIVES OF THE STUDY

PMM&Co.'s overriding goal was to develop a guidance management system, utilizing BTSD as the experimental setting, that could be replicated in other school districts in the Commonwealth of Pennsylvania. Moreover the system as designed by us, and when implemented, had to provide a district with the capability to plan, control and evaluate guidance activities. Consequently, our objectives focused a plan of organization to carry out activities to achieve the objectives as described below.

To assume effective communication among relevant participants and proper coordination of project activities we organized the following groups:

- Policy planning group (PPG), comprised of the Assistant Superintendent for Instruction, the Pupil Personnel Services Director, a member of the school board, a representative from Bureau of Instructional Support Services (Pennsylvania Department of Education), and a principal of a participating school;
- User group representing beneficiaries of guidance services (e.g., pupils, parents, employees, teachers); and
- Three task forces comprised of principals and counselors from the participating elementary, middle and high schools to develop goals and objectives for the guidance program.

Additionally, a guidance/counselor expert, from Temple University served as a consultant in advising us on specific program content areas of guidance.

In regard to the functions of the PPG and User Groups, they reviewed and approved, and commented respectively on our findings and recommendations.

Consistent with the foregoing project organization, we developed a work plan to guide our consultants in accomplishing the following objectives:

- Assess guidance organization and BTSD;s administrative structure.
- Identify current services provided and related activities of the guidance program and develop program structure.
- Determine differential factors which positively influence and negatively constrain the content and function of guidance programs.

- Analyze existing guidance program by comparing interview data and written documentation.
- Design the guidance program management system for BTSD.
- Assist divisional task forces in developing goals and objectives, and in conducting program analysis.
- Define the planning requirements and scheduling criteria to implement or modify the proposed program management system.
- Assist in operationalizing the guidance organization and program management functions.

Subsequent to implementing our work plan, we produced two interim progress reports prior to the completion of the final report. The initial report (dated October 25, 1974) presented results of fact-finding, and the second one (dated November 21, 1974) described components of the recommended guidance management system.

SCOPE OF OUR ASSISTANCE

In accomplishing our engagement objectives, our consulting assistance consisted of the following activities.

- Oriented BTSD school officials and professionals to our work plan.
- Analyzed BTSD's current guidance program and data to determine guidance organization and extent of program documentation.
- Reviewed legislation (Federal, State and local) which impacts guidance program development, and examined literature and reports maintained by professional guidance associations.
- Conducted interviews with users of guidance services (teachers, parents, employees, post-secondary institutions, etc.) to elicit their opinions about guidance program strengths and deficiencies relative to their needs.

- Documented analysis data and interview findings and distributed same to Policy Planning and User groups for their review and comment.
- Developed conceptual design of guidance and management system describing management processes and organizational structure.
- Conducted training sessions for task force groups to enhance their understanding the processes of goal and objective development, program analysis and information and reporting system with the aim of operationalizing the guidance management system.
- Instructed task force groups in the procedural operations of the newly developed guidance management system.

In addition to the foregoing activities, the scope of our assistance included meeting with BISS staff to review the key components of the management system.

III. COMPONENTS AND CONCEPTS OF GUIDANCE MANAGEMENT SYSTEM

The guidance management model represents a system which allows school districts to improve their effectiveness in providing guidance for their students, and their efficiency in planning, analyzing, performing, evaluating, and communicating with the public.

The guidance model is a management tool which incorporates all the processes necessary to identify, plan, execute, and control the activities and resources of the district required to achieve identified objectives. It provides for periodic review and refinement of long and short range goals and objectives to meet the changing needs of the environment.

The guidance management system differs from current planning, management, and budgeting practices in that it emphasizes the integration of the following activities:

- identification of community and pupil needs;
- formal definition of guidance goals, objectives, and priorities;
- arrangement of activities into programs directed toward the achievement of goals and objectives;
- utilization of analytical techniques to choose among alternative programs;
- allocation of resources to programs; and
- evaluation of district guidance activities by assessing the degree to which objectives are accomplished.

Through a comparison of techniques, manpower, money, and other resource requirements, the management model emphasizes selection of the best of competing alternative ways to accomplish a given objective, and stresses the importance of measuring the relationship of program costs to expected achievement levels. It provides decision-makers with a basis for planning revenue requirements of future years by projecting the financial aspect of current or proposed guidance programs. The factors are reflected in budget format as a basis for formal and systematic evaluation. Lastly, the management model provides the basis for program visibility and control through a system of management reporting.

COMPONENT GROUPS OF THE MANAGEMENT SYSTEM

The following positions, some existing and some recommended, are essential to successful implementation of the management system.

Program Coordinator

PMM&Co. recommends establishment of the full-time position of guidance program coordinator reporting directly to the Director of Pupil Personnel Services. Major responsibilities of this position include:

- initiation of the processes within the system at the direction of the Director of Pupil Personnel Services;
- coordination of program development designed to enhance the effectiveness of guidance/counseling services and to ensure continuity throughout all school levels;
- staff support to principals, administrators, and counselors in areas of program definition, program implementation, personnel performance evaluation, recruitment and staffing, and guidance program budget preparation;
- coordination, supervision, monitoring, and evaluation of guidance service activities through the guidance management system; and
- responsibility for developing in-service training for district counselors and for coordinating district programs to keep teachers, parents, and the community informed about guidance.

The guidance coordinator will be the keystone of the management system monitoring, summarizing, and reporting the information flowing through the system, and coordinating district-wide guidance activities.

In addition to the overall program coordinator, if the district is large there may be an additional coordinator for each school division (elementary, middle and high school) who acts as a part-time coordinator of the guidance program at that level. (These additional part-time coordinating responsibilities might be shared by counselor chairmen on an annual rotating basis, or the chairmen at each level might elect one of their group to serve as coordinator for that level.)

User Group

The user group serves a most important system function as an ongoing liaison with the total community served by the district guidance program. Although the service community has essential input to decision-making and planning through periodic surveys, the user group acts as the organizer and conduit for this input, passing on to administrators and counselors information on community-identified guidance needs as well as feedback for necessary modifications.

The user group is composed of representatives of those both within and outside the school district's organization who functionally interface or utilize the guidance services in performance of their professional or social responsibilities. Direct users (those within the school district's organization) include:

- counselors;
- principals and other administrators;
- teachers;
- other pupil personnel services; and
- students.

Indirect users (those outside the school district's organization) include:

- parents;
- labor and industry;
- community agencies and groups;
- post-graduates; and
- institutions of higher education.

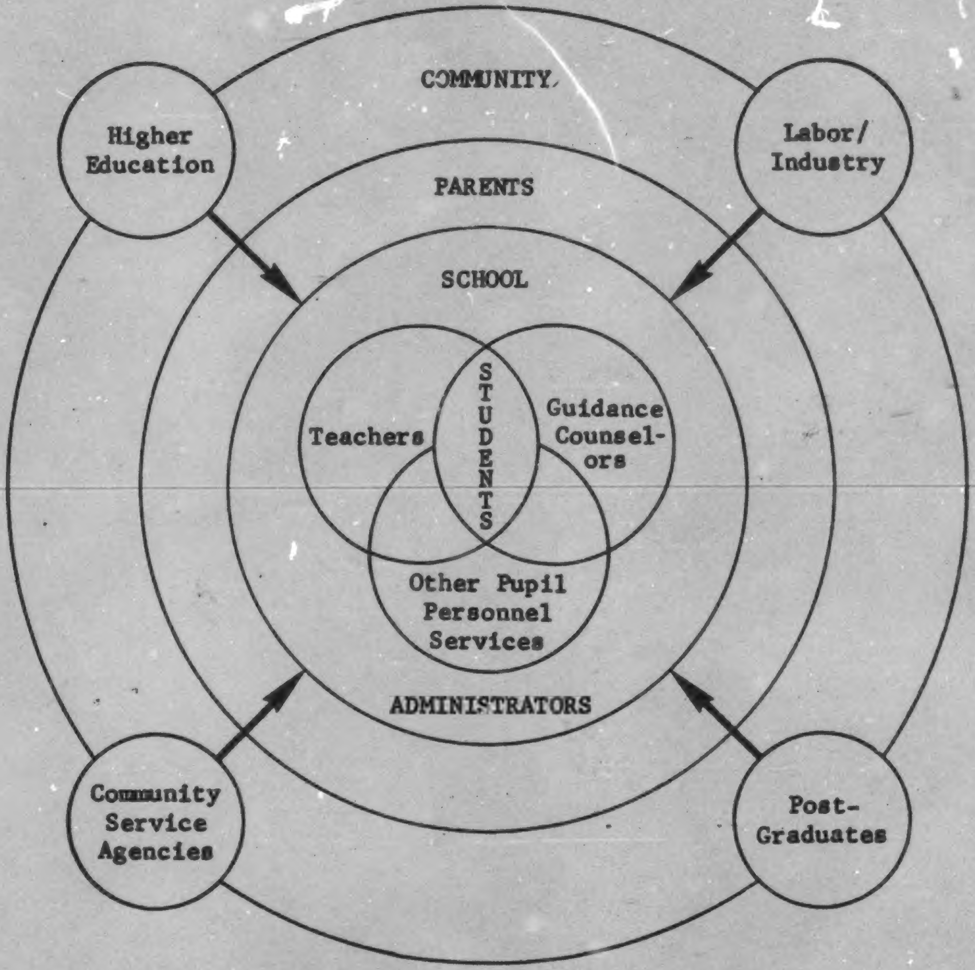

COMMUNITY
Higher Education
Labor/ Industry
PARENTS
SCHOOL
Teachers
STUDENTS
Guidance Counselors
Other Pupil Personnel Services
ADMINISTRATORS
Community Service Agencies
Post-Graduates

FIGURE 1: INTERRELATIONSHIP OF GUIDANCE SERVICE COMMUNITY

Representatives of each of these users will be members of the guidance system's user group. Figure 1 shows a schematic of the relationship of these different types of users within the overall community served by the district guidance program.

Program Development Task Forces

The actual development of goals, objectives, programs, and program activities for the management system is the responsibility of two major groups: the district task force and the divisional task forces.

The district task force, which develops only guidance goals for the district is composed of a group of administrators, counselors, and community representatives who are familiar with both the guidance program and the overall goals of the school district. (Guidance goals must be in accord with the total educational philosophy of the district.)

Suggested composition of the district task force includes:

- Assistant Superintendent for Curriculum and Instruction;
- Director of Secondary Education;
- Director of Elementary Education;
- Director of Pupil Personnel Services;
- Guidance program coordinator;
- Two or more counselors; and
- Two or more community representatives (e.g., parents, employers).

The district task force functions primarily during Phase II, "Program Development and Budgeting;" its activities consist primarily of the initial development of district-wide guidance goals and the annual review of those goals to update them and assess progress made toward meeting them. The district task force is also responsible for reviewing the goals developed by the other task forces to ensure continuity among the goals set for elementary, middle, and high school guidance.

There are three divisional task forces, one each for the elementary, middle, and high school. They are composed of persons involved with actual counseling and with policy and decision-making in the schools. At the middle and high school divisions, the divisional task forces include:

- two or more counselors from each involved school;
- some or all principals from the involved schools;
- one or more teacher representatives from these schools;
- the Director of Pupil Personnel;
- the Director of Secondary Education; and
- the guidance program coordinator.

The elementary level task force includes fewer principals but has essentially the same composition:

- counselors;
- one or more principals;
- one or more teacher representatives;
- the Director of Pupil Personnel;
- the Director of Elementary Education; and
- the guidance program coordinator.

It should be noted that ten is probably the largest workable membership for any of the task forces. If all the schools in the district (rather than just pilot schools) are to participate from the first year, representatives of the counselors and principals will have to be elected from those groups in order to keep the number of task force members manageable. If possible, there should be a mix of grade levels within each task force to ensure continuity in guidance among the three levels.

Divisional task forces are primarily responsible for developing goals for each division (elementary, middle, and high school) which are in accord with district-wide guidance goals; developing goals and objectives at the program level; examining current programs and programmatic activities and suggesting appropriate alternatives for achieving the objectives; and evaluating programmatic success and developing possible revisions. These tasks are described in more detail in the discussion of the guidance management model.

Policy Planning Group

For the pilot study in Bristol Township, the management system included an advisory board which functioned as project monitor. The Policy Planning Group (PPG) acted as a sounding board during initial system and program definition, and again at the first year-end review. After the guidance management system is refined and fully operational, the PPG may be disbanded.

BASIC MANAGEMENT SYSTEM CONCEPTS

The following elements are essential to a program management system for guidance.

Program Structure

The guidance services within the district are composed of programs - groups of independent, closely related activities contributing toward a common aim. High school career counseling is an example of a common program within guidance services.

In developing a management framework for guidance, it is necessary to examine what guidance programs currently exist within a district and arrange them tentatively into a hierarchical organization called a program structure. (This tentative structure may be modified during program analysis.)

The program structure provides a basic framework for three main functions:

- collecting and reporting data and planning;
- developing objectives and evaluating program success; and
- relating functions and activities to each other so that responsibilities can be clearly assigned.

A program structure, although related to some organizational elements, is not an organization structure since it classifies and groups functions and activities rather than people or positions. Program structure also is not static; programs within the structure may be added or deleted to meet the changing needs of the district.

Figure 2 represents a model program structure for guidance services, as developed by the U.S. Office of Education in cooperation with the American Personnel and Guidance Association, the National Education Association, and others. The basic elements of this model probably hold true for all districts; however, each district should analyze the responsiveness of its programs to its own needs and goals. (For the modified program structure used by Bristol Township School District, see Appendix B.)

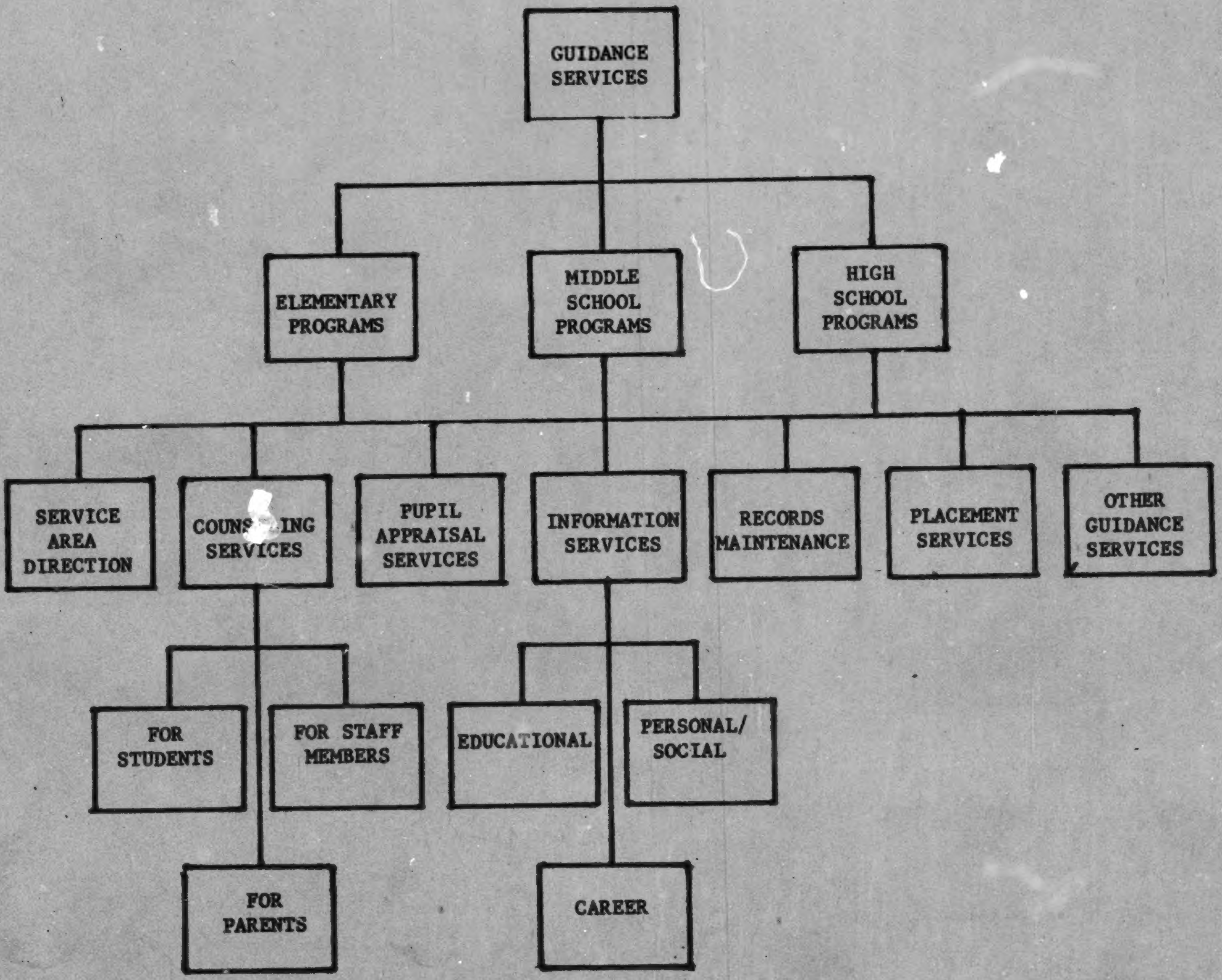
At the top of the pyramid is the guidance function which includes all guidance activities provided for students, parents, and other staff members. The basic guidance function is divided into the elementary, middle, and high school divisions, which address the needs of these different groups of students.

In developing the program structure further, each of these school divisions is subdivided into the appropriate programs for that division. For example, elementary programs include such functions as administration of the overall elementary division guidance program, counseling services (including counseling with students and parents and consulting with staff), pupil appraisal services, information services, records maintenance service, and placement services.

Elementary programs usually should not include activities such as financial aid services--assisting students in obtaining scholarships, grants, loans, or employment to pay for their educational expenses--these activities comprise a more appropriate high school division activity.

Many of the programs at the third level can be divided into more specific programmatic areas, e.g., elementary counseling can be broken into counseling with students, with parents, and with other staff members, such as teachers, principals, and psychologists. The purpose of delineating programs so specifically is to define the scope of activities within guidance services so that

FIGURE 2: TYPICAL GUIDANCE PROGRAM STRUCTURE


GUIDANCE SERVICES
ELEMENTARY PROGRAMS
MIDDLE SCHOOL PROGRAMS
HIGH SCHOOL PROGRAMS
SERVICE AREA DIRECTION
COUNSELING SERVICES
PUPIL APPRAISAL SERVICES
INFORMATION SERVICES
RECORDS MAINTENANCE
PLACEMENT SERVICES
OTHER GUIDANCE SERVICES
FOR STUDENTS
FOR STAFF MEMBERS
FOR PARENTS
EDUCATIONAL
PERSONAL/ SOCIAL
CAREER

those responsible for carrying out the activities understand the boundaries of each program. Goals and objectives can thus be developed to measure the success of each element and to identify which elements, if unsuccessful, need to be strengthened, modified, or eliminated.

This program structure does not imply that all elements on the same level are of equal importance or should be assigned equal resources. Depending upon the needs of the community--the users of guidance services--more priority may be given to some programs than others. The model structure represents the significant guidance services which ideally should be provided to some degree.

Figure 3 is a matrix which shows the degree to which the pilot district currently is carrying out the activities described in the guidance program structure. The matrix was completed based on information obtained from interviews and analysis of materials describing guidance activities now carried on. This type of subjective overview of district guidance services program should be a district's first step in assessing the current status of the program.

Once the district has identified and classified its activities into the management framework of a tentative program structure, the process of setting goals and objectives for guidance services can begin.

Goals

A goal is a statement of broad direction that is general and is not concerned with particular achievements within a specified timeframe. Each district establishes and maintains a series of goal statements based on the unique needs, philosophies, policies, and purposes of the guidance services for its community.

PROGRAM AREA	DIVISION		
	ELEMENTARY	MIDDLE	HIGH SCHOOL
SERVICE AREA DIRECTION	(primarily Director of Pupil Personnel Services)		
COUNSELING SERVICES with Students	1	1	1
with Parents	2	3	3
with Other Staff Members	1	3	3
PUPIL APPRAISAL SERVICES	3	3	2
INFORMATION SERVICES Educational Information	3	2	1
Vocational Information	3	3	2
Personal/Social Information	3	3	3
RECORDS MAINTENANCE SERVICES	1	1	1
PLACEMENT SERVICES	3	1	1

LEGEND 1 = Strong Activity
2 = Moderate Activity
3 = Little or No Activity

FIGURE 3: PILOT DISTRICT GUIDANCE SERVICES MATRIX (USING MODEL PROGRAM STRUCTURE)

District-wide goals should not simply reflect the status quo, but rather provide a direction for a desired end state. They vary according to the characteristics of each school district. For example, the guidance goal statements for a suburban district with a large collegebound student population might have goals emphasizing preparation for the transition to college. Other suburban districts might have most of their goals focusing on postgraduate employment.

Ideally, goal statements can and should be developed down to the level of the individual school, thus allowing for differences among the needs of schools. However, often it is not possible to carry goals to that level of detail at the beginning of the goal development process.

Goals may be written as expected student outcomes, conditions for operating the district guidance program, or expectations for district personnel. The following are examples of district guidance goals established as part of the guidance management system of one district:

> To provide guidance and counseling services for all district school children.
>
> To share with other school personnel, parents, and the community the responsibility for helping our young people become contributing members of our community and, in turn, our society.
>
> To help each student in the understanding and acceptance of self and to appreciate and accept the worth and dignity of others.
>
> To support the instructional program and the learning process in order to make education meaningful, interesting, and successful for every student.
>
> To maintain a system of professional self-development.

Goals are to be set for the major levels of the program structure. These goals can then be related in a hierarchy of specificity. For example, in the guidance management system, there are district-wide goals established for guidance services and then goals set for the elementary, middle, and high school divisions which were more specific than the overall goals and related to them. If necessary, the elementary, middle, and high school level goals may be supported by more specific lower level goals.

The basic concept is to develop a goal hierarchy in which each layer of goals supports the next higher level, with the broadest goals at the top and increasingly more specific goals at lower levels. One branch of a sample hierarchy is shown in Figure 4.

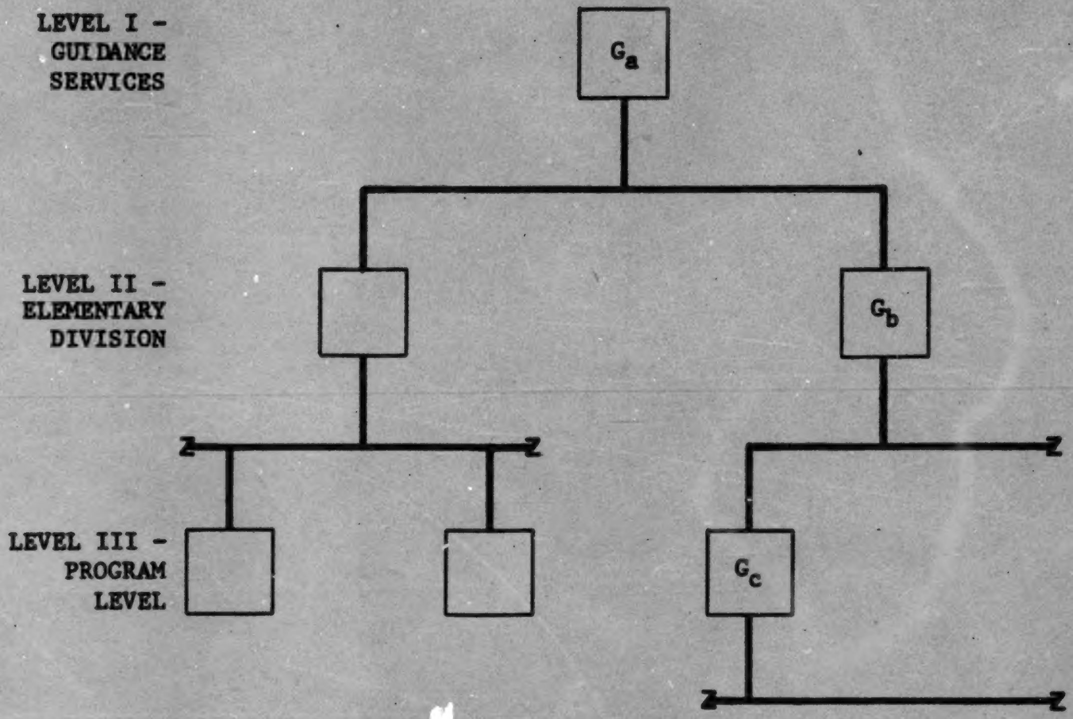
The reduction of broad goals to their more specific application is particularly useful as a prelude to the development of objectives.

Objectives

An objective is defined as a measurable desired accomplishment, related to one or more goals; its attainment within a given timeframe and under specifiable conditions can be evaluated. The attainment of each objective advances progress toward corresponding goals.

Objectives are written to describe the explicit targets for action or change which are the focus of activities within guidance services. Objectives are in effect a clarification, quantification, and further definition of goal statements. They provide the basis for identifying tangible information required for internal management of guidance as well as a basis for communicating progress toward a goal.

Guidance objectives can be written in terms of changes in student behavior or in terms of guidance staff and facility performance. A common method of stating objectives for guidance programs is to specify the desired performance of students after counseling. Objectives may deal with minimums, averages, progress over time, or outcomes at the end of a program, but every objective must include the evaluation criteria by which it is measured. Various techniques can be used for performance measurement, including testing, rating scales, observation, and anecdotal records.


LEVEL I - GUIDANCE SERVICES
LEVEL II - ELEMENTARY DIVISION
LEVEL III - PROGRAM LEVEL
G_a
G_b
G_c
Z
Z
Z
Z
Z

G_a - To provide guidance services to all students.

G_b - To help all elementary students to adjust to the school setting and working with their peer group.

G_c - To help elementary level counselors be aware of the latest techniques and methods for dealing with the socially maladjusted child.

FIGURE 4: SAMPLE SECTION OF GOAL HIERARCHY

Although theoretically one or more objectives may be developed to relate to each goal in the goal hierarchy, common practice has been to develop objectives for the goals at the lowest complete level of the program structure. An example of a goal for elementary pupil counseling is:

Goal: To help elementary students, through counseling, to adjust to the school setting and to learn to get along with their peers.

Objective: By the end of fifth grade, 95 percent of the students who received counseling will exhibit socially acceptable classroom behavior as evaluated subjectively by the fifth grade teachers and recorded in counseling office records.

Another example is an objective relating to a goal of providing senior high school information services:

Goal: To keep parents and other members of the community informed of the guidance services available to high school students.

Objective: By the end of the twelth grade, the parents of all students will have had at least one interview with their child's counselor, through such methods as individual sessions, telephone calls, home visits, and contacts through PTA meetings and "Career Night" activities. Objective to be measured by counselors' records of those parents who were interviewed.

Objectives, as indicators of achievements, are intended to measure advancement toward a corresponding goal. It is recognized that the term "measurement" is capable of various practical interpretations. The attainment of guidance objectives can be measured either subjectively or objectively, within a given time under specifiable conditions. Many very important guidance objectives may be neglected because they are considered too intangible to measure. Objectives dealing with ideas or concepts should not be ignored because of the difficulties inherent in measuring achievement quantitatively.

Program Analysis

Program analysis is the process that develops activities within program areas responsive to stated goals and objectives. All programs are analyzed through the initial goal and objective development process; subsequently, annual program evaluation, major changes in guidance needs, and annual goal/objective review point up areas for program analysis.

In an operational guidance management system, program analysis is an ongoing process, utilized by counselors, principals, and other decision-makers as they deal with everyday questions. The first program analysis occurs, however, after goals and objectives have been defined, when decision-makers identify whether groups of ongoing activities (programs) at each division are addressing the goals and objectives. The process involves the following kinds of questions about current programs.

- Are these activities adequately directed toward meeting their related objectives?
- Are some of these activities and programs not relevant to any of our stated objectives? (The activities and programs may have to be modified or eliminated.)
- Are some of the objectives not being addressed by any programs? Will new programs have to be created for these objectives?

The process of program analysis results in descriptions of all current programs, along with the objectives and goals to which they relate.

Program Budgeting

After objectives have been set for the program goals and programs have been analyzed for their suitability, a program budget is prepared for each program in the structure. The program budget is a plan that relates proposed expenditures for programs to goals and objectives within a specified time-frame, based upon a program structure classification and constructed from the lowest level of the structure upwards. The budget includes the proposed source for financing programs.

Program budgeting is a comparatively recent development in budgeting techniques as it relates to Federal, State, local governments and nonprofit service organizations. Program budgeting is a system of financial resource allocation which:

- emphasizes the program outputs or products of the service providing entity (for example, in the guidance area, a program budget would stress such end-products and outputs as career counseling and parent interviews); and
- requires a thorough review, during each budget cycle, of ongoing and proposed new programs as they relate to constant and changing needs, program goals and objectives.

On the other hand, the traditional function/object budget still predominately in use within nonprofit organizations is a system which emphasizes program inputs such as salaries, supplies, and contracted services, and normally does not relate these inputs in any manner to program outputs. A typical function/object budget developed for guidance discloses the number of personnel by position, purchased supplies by type, and capital outlay. Function/object budgeting perpetuates the incremental funding of ongoing programs with little, if any, relation to changing needs.

The annual district program budget for guidance documents the planned allocation of available resources for specific programs. Since programs are related to goals and objectives, the budget in effect relates costs to needs and desired accomplishments.

The program budget is divided into two major areas: program description and cost data. The former contains at least the major goals and objectives of each program, as well as a description of the activities comprising that program. Using this description it is possible to determine if program activities are actually directed toward and appropriate to achievement of the objectives.

Program cost data include budgeted or estimated program costs and revenues for the current year as well as forecasts of cost, income, and growth for at least three years into the future. By projecting program costs and revenues beyond the budget year, substantial increases in costs (following planned program expansion) or decreases in revenues (following the end of special funding support from other agencies) may be better anticipated.

Under the program budgeting concept, necessary budget costs are not made arbitrarily across the board by object classification. The program budgeting technique provides the decision-maker with full knowledge of the impact of budget reductions on program output and thus encourages budget reductions by given priorities of programs. In this way, program budgeting fosters individual contribution to the achievement of goals and objectives.

Program budgeting incorporates or maintains existing information related to program inputs, but relates these inputs especially to program outputs. Program budgeting is an integral part of the management process in that budgets are prepared only after annual program review to determine what programs are to be offered in light of well-defined needs, goals, and objectives.

IV - DESCRIPTION AND DOCUMENTATION OF MANAGEMENT MODEL

This section describes the various system processes of the guidance management model. These processes are ongoing functions which are inextricably related to the continuous management of the district's guidance function. The processes are categorized into the following phases:

Phase I: Needs Survey
Phase II: Program Development and Budgeting
Phase III: Program Operation and Monitoring
Phase IV: Evaluation

The four phases comprise the guidance management model and can be graphically illustrated as a continuous cycle (i.e., moving sequentially from initiation of the management system, with the needs survey, through goal and objective definition, program development, implementation, monitoring and control, to evaluation, and subsequently relating back to initiation). An overview of this cycle is illustrated in Figure 5.

PHASE I: NEEDS SURVEY

During this first phase of the guidance system, there are three major tasks:

- initiation and coordination of data gathering on community guidance needs;
- survey of community; and
- identification of operating and budgetary constraints.

(Figure 6 shows the operational flow of Phase I.)

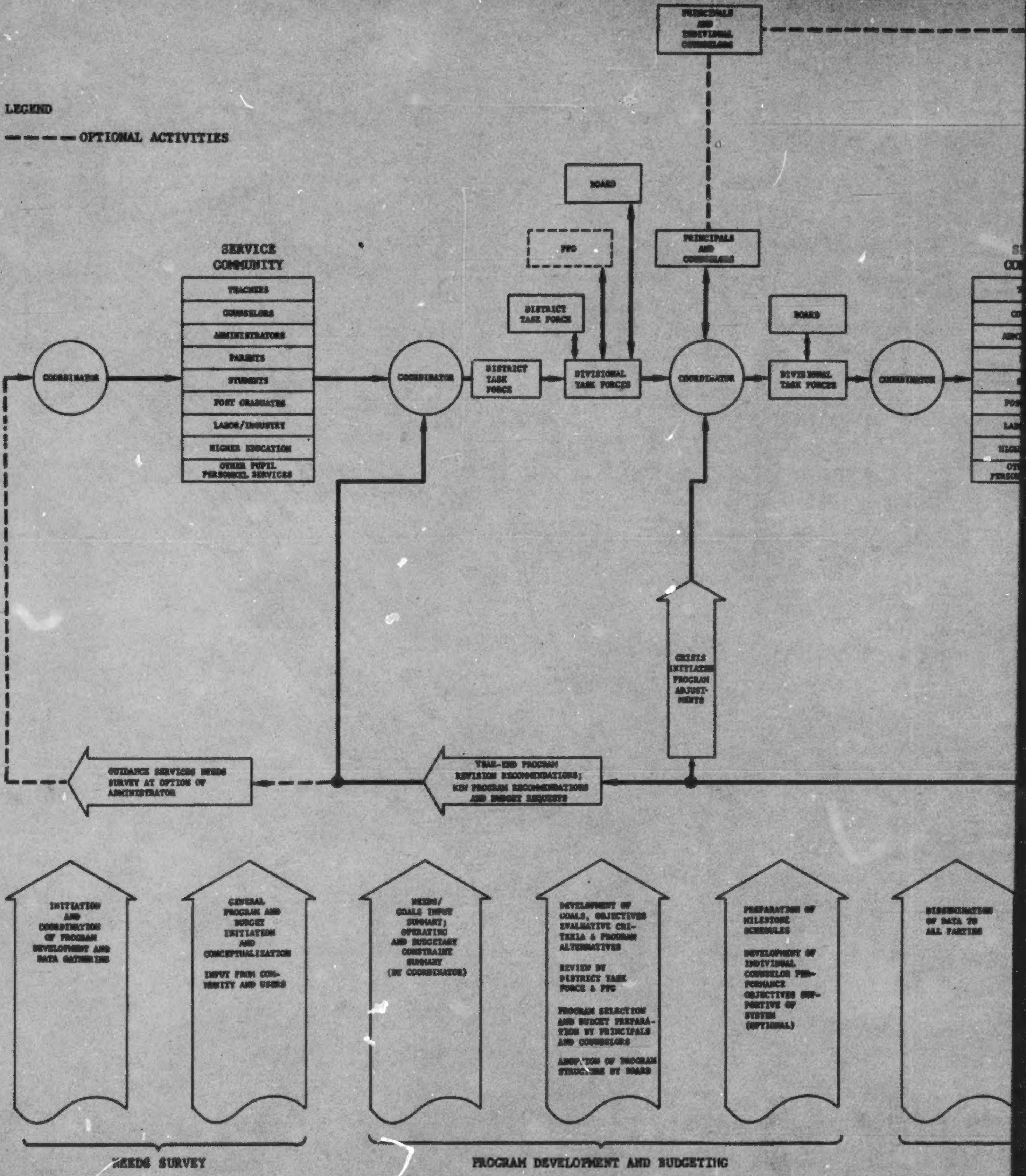
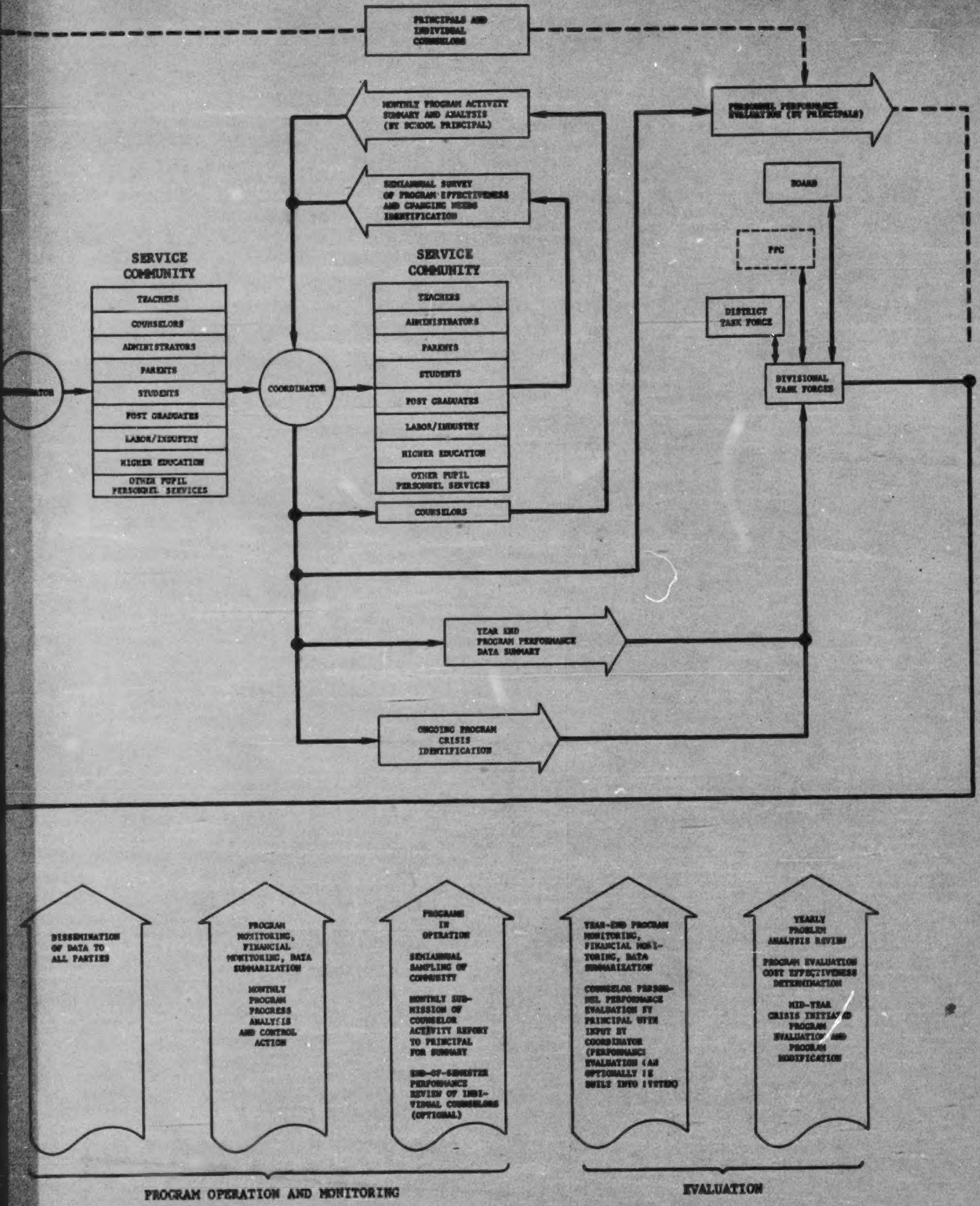

LEGEND
OPTIONAL ACTIVITIES
PRINCIPALS AND INDIVIDUAL COUNSELORS
BOARD
PPG
PRINCIPALS AND COUNSELORS
SERVICE COMMUNITY
TEACHERS
COUNSELORS
ADMINISTRATORS
PARENTS
STUDENTS
POST GRADUATES
LABOR/INDUSTRY
HIGHER EDUCATION
OTHER PUPIL PERSONNEL SERVICES
DISTRICT TASK FORCE
BOARD
COORDINATOR
COORDINATOR
DISTRICT TASK FORCE
DIVISIONAL TASK FORCES
COORDINATOR
DIVISIONAL TASK FORCES
COORDINATOR
CRISIS INITIATED PROGRAM ADJUST-MENTS
GUIDANCE SERVICES NEEDS SURVEY AT OPTION OF ADMINISTRATOR
YEAR-END PROGRAM REVISION RECOMMENDATIONS; NEW PROGRAM RECOMMENDATIONS AND BUDGET REQUESTS
INITIATION AND COORDINATION OF PROGRAM DEVELOPMENT AND DATA GATHERING
GENERAL PROGRAM AND BUDGET INITIATION AND CONCEPTUALIZATION
INPUT FROM COMMUNITY AND USERS
NEEDS/ GOALS INPUT SUMMARY; OPERATING AND BUDGETARY CONSTRAINT SUMMARY (BY COORDINATOR)
DEVELOPMENT OF GOALS, OBJECTIVES EVALUATIVE CRITERIA & PROGRAM ALTERNATIVES
REVIEW BY DISTRICT TASK FORCE & PPG
PROGRAM SELECTION AND BUDGET PREPARATION BY PRINCIPALS AND COUNSELORS
ADOPTION OF PROGRAM STRUCTURE BY BOARD
PREPARATION OF MILESTONE SCHEDULES
DEVELOPMENT OF INDIVIDUAL COUNSELOR PERFORMANCE OBJECTIVES SUPPORTIVE OF SYSTEM (OPTIONAL)
DISSEMINATION OF DATA TO ALL PARTIES
NEEDS SURVEY
PROGRAM DEVELOPMENT AND BUDGETING

FIGURE 5: GUIDANCE MANA


PRINCIPALS AND INDIVIDUAL COUNSELORS
MONTHLY PROGRAM ACTIVITY SUMMARY AND ANALYSIS (BY SCHOOL PRINCIPAL)
SEMIANNUAL SURVEY OF PROGRAM EFFECTIVENESS AND CHANGING NEEDS IDENTIFICATION
PERSONNEL PERFORMANCE EVALUATION (BY PRINCIPALS)
BOARD
PPC
DISTRICT TASK FORCE
DIVISIONAL TASK FORCES
SERVICE COMMUNITY
TEACHERS
COUNSELORS
ADMINISTRATORS
PARENTS
STUDENTS
POST GRADUATES
LABOR/INDUSTRY
HIGHER EDUCATION
OTHER PUPIL PERSONNEL SERVICES
ATOR
COORDINATOR
SERVICE COMMUNITY
TEACHERS
ADMINISTRATORS
PARENTS
STUDENTS
POST GRADUATES
LABOR/INDUSTRY
HIGHER EDUCATION
OTHER PUPIL PERSONNEL SERVICES
COUNSELORS
YEAR END PROGRAM PERFORMANCE DATA SUMMARY
ONGOING PROGRAM CRISIS IDENTIFICATION
DISSEMINATION OF DATA TO ALL PARTIES
PROGRAM MONITORING, FINANCIAL MONITORING, DATA SUMMARIZATION
MONTHLY PROGRAM PROGRESS ANALYSIS AND CONTROL ACTION
PROGRAMS IN OPERATION
SEMIANNUAL SAMPLING OF COMMUNITY
MONTHLY SUBMISSION OF COUNSELOR ACTIVITY REPORT TO PRINCIPAL FOR SUMMARY
END-OF-SEMESTER PERFORMANCE REVIEW OF INDIVIDUAL COUNSELORS (OPTIONAL)
YEAR-END PROGRAM MONITORING, FINANCIAL MONITORING, DATA SUMMARIZATION
COUNSELOR PERSONNEL PERFORMANCE EVALUATION BY PRINCIPAL WITH INPUT BY COORDINATOR (PERFORMANCE EVALUATION (AS OPTIONALLY IS BUILT INTO SYSTEM)
YEARLY PROBLEM ANALYSIS REVIEW
PROGRAM EVALUATION COST EFFECTIVENESS DETERMINATION
MID-YEAR CRISIS INITIATED PROGRAM EVALUATION AND PROGRAM MODIFICATION
PROGRAM OPERATION AND MONITORING
EVALUATION

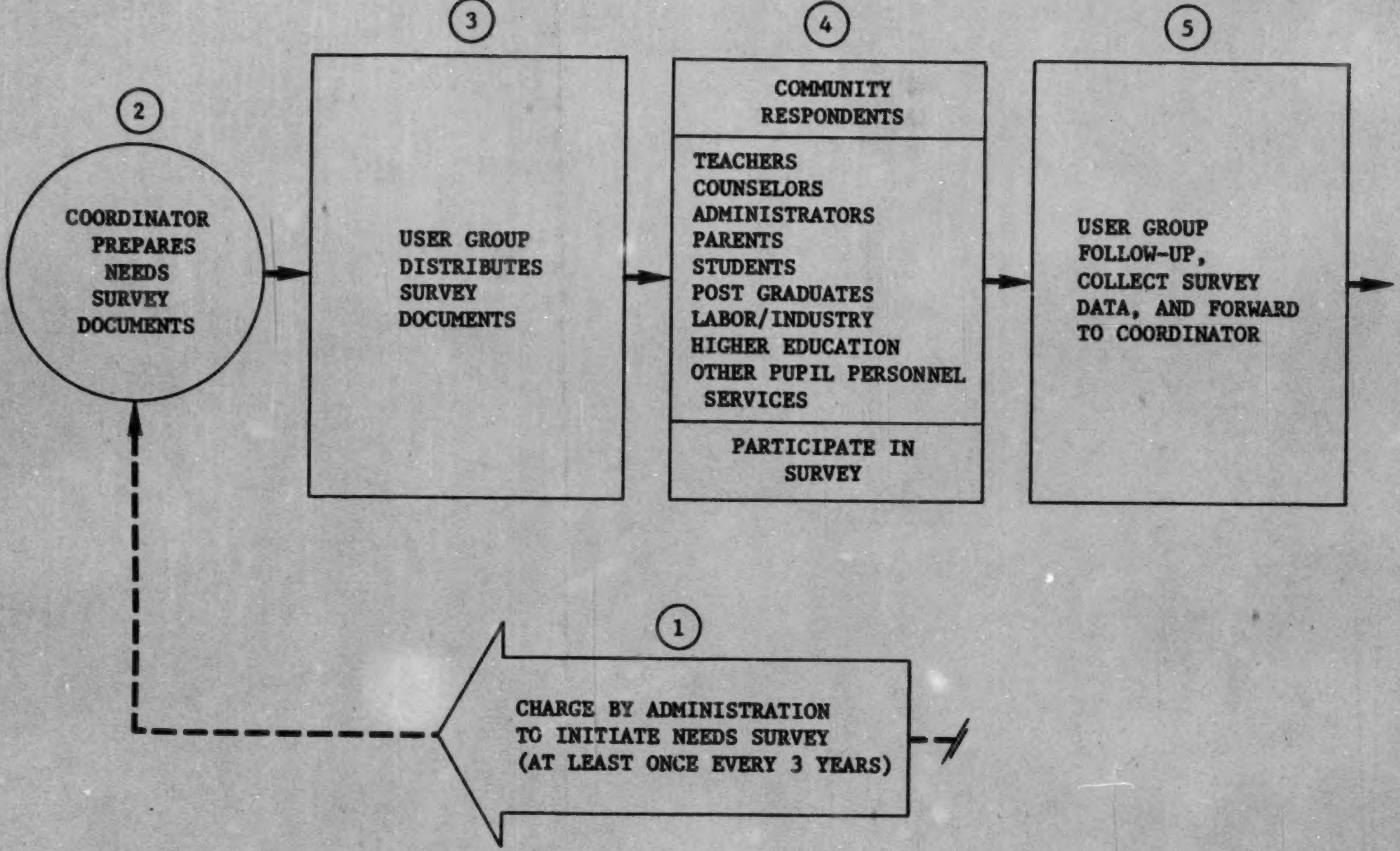

② COORDINATOR PREPARES NEEDS SURVEY DOCUMENTS
③ USER GROUP DISTRIBUTES SURVEY DOCUMENTS
④ COMMUNITY RESPONDENTS
TEACHERS
COUNSELORS
ADMINISTRATORS
PARENTS
STUDENTS
POST GRADUATES
LABOR/INDUSTRY
HIGHER EDUCATION
OTHER PUPIL PERSONNEL SERVICES
PARTICIPATE IN SURVEY
⑤ USER GROUP FOLLOW-UP, COLLECT SURVEY DATA, AND FORWARD TO COORDINATOR
① CHARGE BY ADMINISTRATION TO INITIATE NEEDS SURVEY (AT LEAST ONCE EVERY 3 YEARS)

FIGURE 6: PHASE I — NEEDS SURVEY

The needs survey phase begins with the administration's charge to the guidance program coordinator to begin an assessment of the community's perceptions of the current guidance program and its guidance needs.

The user group (whose composition is described in Section III) will act as the vehicle for collection of data from the community. The group receives an orientation from the coordinator on their mission as representatives of different segments of the community. With the help of the program coordinator, the members of the group will be responsible for organizing a mail survey, answering questions from their respective groups, and conducting any follow-up.

A sample mail survey (see Figure 7) has been designed to allow standardized, comparable input from all groups, with emphasis on the identification of guidance needs and operating constraints. In following up on the questionnaires or getting additional input, members of the user group may want to hold individual or group meetings or mail out follow-up questionnaires.

It should be noted that a complete community needs survey - one which queries all community members, whether they have any contact with district guidance services - ideally takes place at the beginning of the development of the guidance management system and then is repeated each year as the management cycle begins again. However, the abbreviated survey described here, which addresses only the major users of district guidance services, can be substituted for the more comprehensive study. In addition, for practical reasons, this survey may be conducted every three years instead of annually.

During this needs survey phase, the program coordinator also notifies the business officer of the start of data gathering and requests a list of potential budgetary and operating constraints communicated to that office by the district's Board of Directors through the central administrative staff. Some of these

FIGURE 7: GUIDANCE/COUNSELING SERVICES

COMMUNITY NEEDS SURVEY (BY MAIL)

DATE:

DEAR COMMUNITY MEMBER:

Your school district would like to know what you think what students and the community needs most from the elementary/secondary school guidance program. This survey will allow you to indicate which guidance activities are most important in your opinion. The survey is anonymous; the results will be tabulated and made public later. Please return the completed form within one week of your receiving it.

TYPE OF RESPONDENT: Check the group or groups best describing your relationship to the school district.

___1. Teacher
___2. Guidance Counselor
___3. School Administrator
___4. Parent of Student in District Schools
___5. Student
___6. Post Graduate of Bristol Township School District
___7. Local Labor/Industry Employer
___8. Local Higher Education Admissions Officer
___9. Other School District Staff
___10. Community Resident
___11. State Employment Agency Worker
___12. Community Service Worker
___13. Other (please describe) ______________________

Below is a list of nine activities that form the foundation of a comprehensive guidance program. We would like your opinion of their relative importance to the overall guidance program. Please rank them in order of importance by placing a number one (1) next to the activity you consider most important and then continuing through to the least important activity which would be ranked nine (9).

____ Establish and maintain relevant student records.
____ Counsel students in academic, career, and personal/social areas.
____ Counsel parents on their student's problems.
____ Work with other professional school staff members, such as teachers, to solve student problems.
____ Provide general career information to students.
____ Provide general educational information to students.
____ Provide general personal/social information to students.
____ Administer the district's standard test program and other tests to help students define his academic, personal, and career goals.
____ Assist students in getting jobs while in school and after graduation or in being admitted to the postsecondary school of their choice.
____ ____
____ ____
____ ____

* * * * *

FOR USE BY LOCAL EMPLOYERS, ADMISSIONS OFFICERS, AND PLACEMENT OFFICERS

If you have interviewed school district students or graduates for employment or postsecondary education admissions, please comment on any guidance-related strengths or problems you have noticed overall (for example, in their ability to conduct interviews and fill out forms appropriately, or in work or study attitudes and habits, or in adjustment to new work or study situations).

____
____
____
____
____

constraints may involve limits placed by the Board on funds or staff; others may reflect a lack of data processing capability. In addition, the program coordinator should be aware of district budgetary assumptions and priorities.

Typically, at the initiation of the budget cycle, the Board is aware of the community's view of tolerable millage increases. Based on a general reading of this opinion, the Board could impose budgetary constraints such as:

1. There will be no increase in professional staff during the next fiscal year.
2. Purchased services will be reduced 10 percent.
3. All extraordinary repairs will be postponed, to the degree possible, until the next fiscal year.

District budgetary assumptions include factors such as pupil projection estimates for the coming school year, building closings, or an influx of parochial school pupils, which impact workloads and the budget.

Any changes in district priorities between school years also is communicated during the primary stages of the budget cycle. For example, added emphasis might be placed on career counseling during the coming school year concurrent with an increased level of federal funding for career education, or with an increase in the unemployment rate of recent graduates.

PHASE II: PROGRAM DEVELOPMENT AND BUDGETING

The following actions are carried out during this phase:

- summarization and reporting of community input to the task forces;
- integration of this input along with other inputs into the development of districtwide guidance goals;
- development of goals and objectives for the lower levels of the tentative program structure;
- review of programs and program activities;
- development of program budgets;

- adoption of completed program structure;
- preparation of activity and milestone schedules; and
- optional development of counselor personal performance objectives.

(Figure 8 illustrates the flow of work throughout Phase II.)

Phase II begins after all written responses to the survey and follow-up are collected by the members of the user group and given to the coordinator. The coordinator summarizes the responses and reports them, along with any identified budgetary and operating constraints, to the district task force.

The district task force thus begins the process of developing top-level, districtwide guidance goals. (Only goals are developed at the higher levels of the program structure.) Using as a starting point the ranking of guidance activities developed from the user survey and the general purpose statements of guidance philosophy most districts already have defined, the task force should have little difficulty developing goals for the district.

Since not all community guidance needs can be addressed equally by the district, the task force will give higher priority to some needs than others and develop goals based on these higher priorities.

After the district task force has written the district goals for guidance, the divisional task forces can begin to establish goals at lower levels of the program structure. These task forces also receive the coordinator's report of community guidance needs and possible constraints, some of which will relate to more specific activities and programs than can be addressed by the district goals.

Each of the three task forces (at elementary, middle, and high school divisions) develop written goals for that division which are supportive of the district-wide goals. The goals should reflect both community and professional concerns and are directed specifically toward the guidance concerns of that

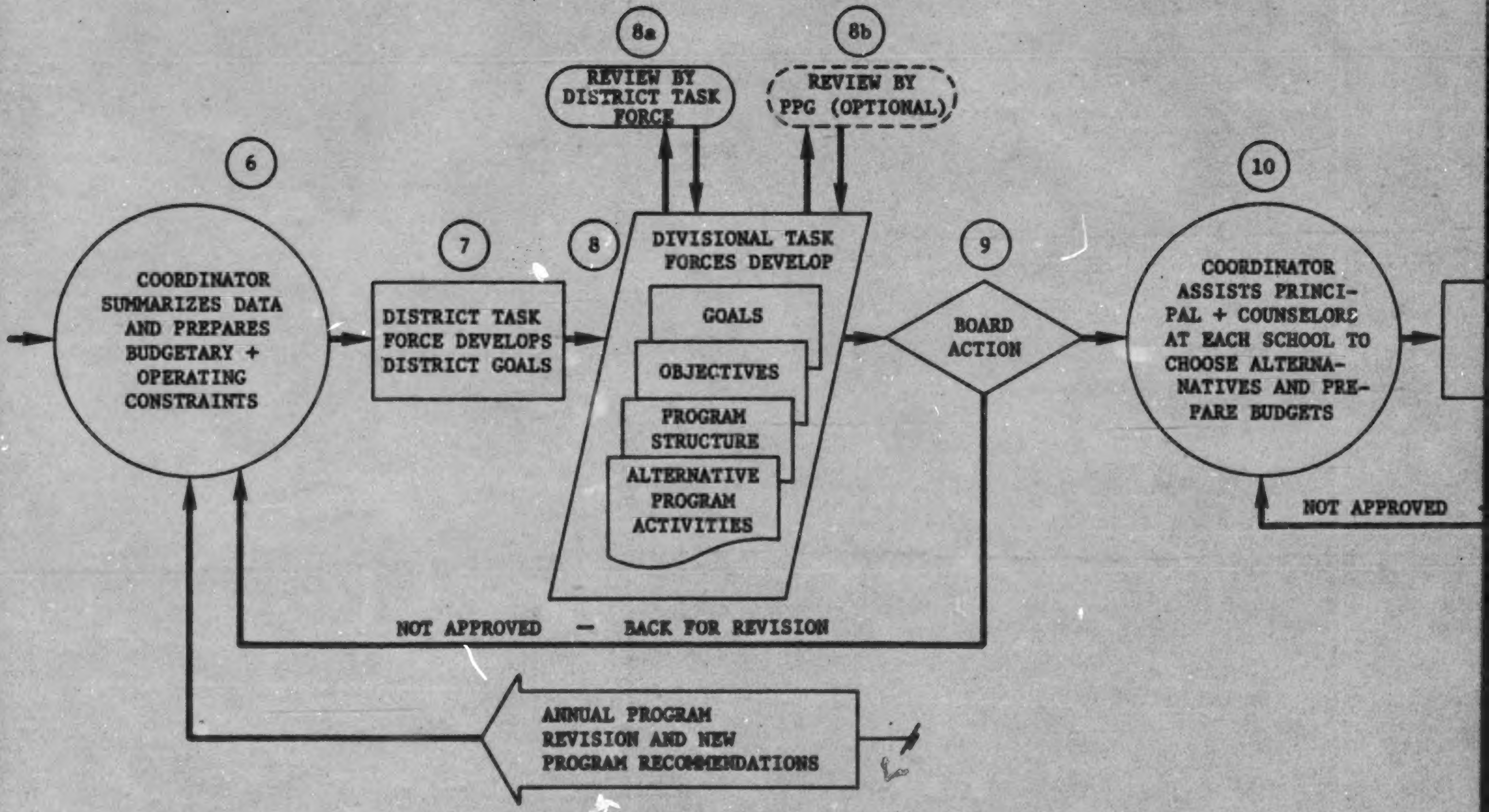
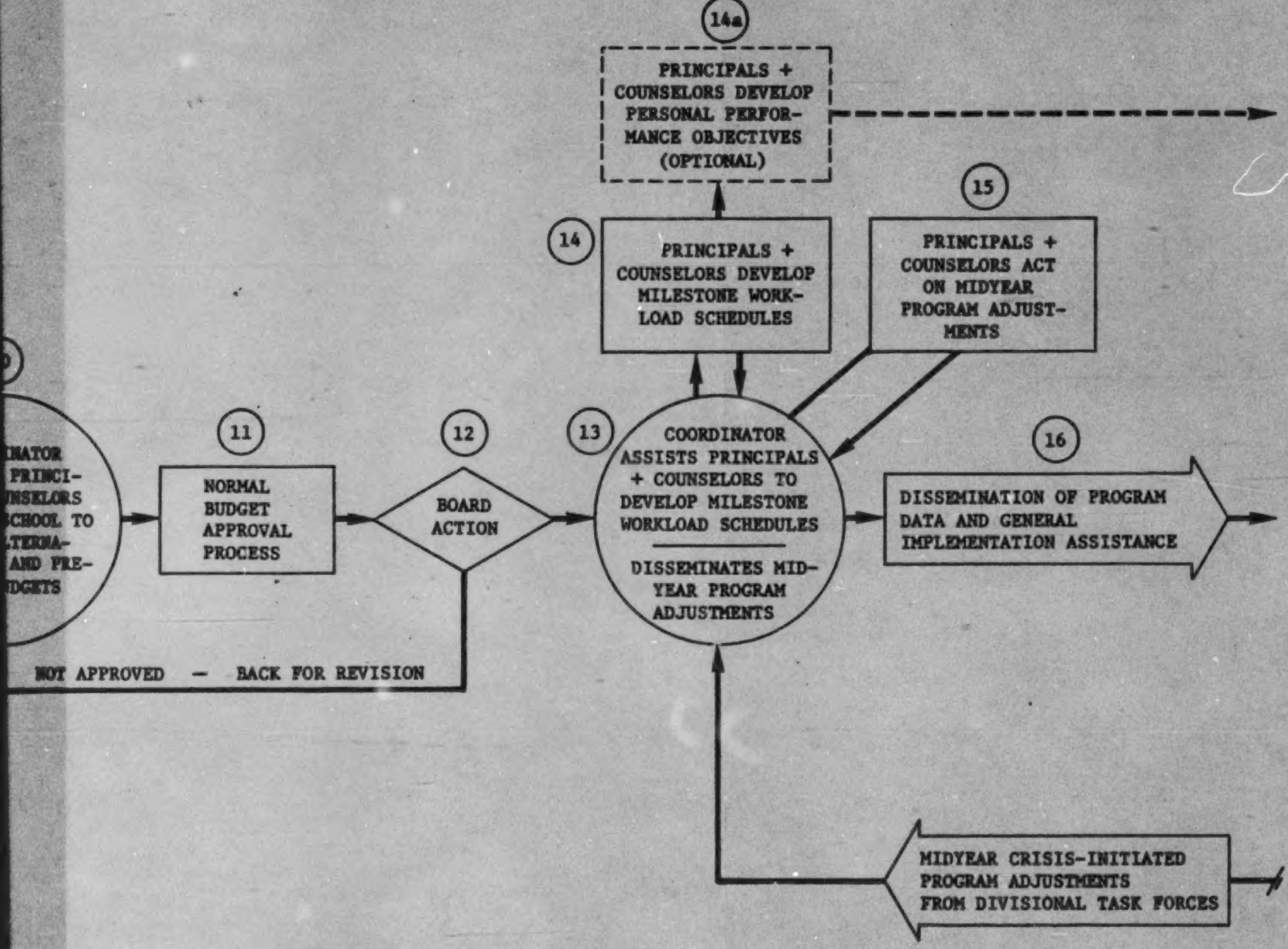

8a
REVIEW BY DISTRICT TASK FORCE
8b
REVIEW BY PPG (OPTIONAL)
6
COORDINATOR SUMMARIZES DATA AND PREPARES BUDGETARY + OPERATING CONSTRAINTS
7
DISTRICT TASK FORCE DEVELOPS DISTRICT GOALS
8
DIVISIONAL TASK FORCES DEVELOP
GOALS
OBJECTIVES
PROGRAM STRUCTURE
ALTERNATIVE PROGRAM ACTIVITIES
9
BOARD ACTION
10
COORDINATOR ASSISTS PRINCIPAL + COUNSELORS AT EACH SCHOOL TO CHOOSE ALTERNATIVES AND PREPARE BUDGETS
NOT APPROVED
NOT APPROVED — BACK FOR REVISION
ANNUAL PROGRAM REVISION AND NEW PROGRAM RECOMMENDATIONS

FIGURE 8: PHASE II — PROGRAM DEVELO


14a
PRINCIPALS + COUNSELORS DEVELOP PERSONAL PERFORMANCE OBJECTIVES (OPTIONAL)
15
14
PRINCIPALS + COUNSELORS DEVELOP MILESTONE WORKLOAD SCHEDULES
PRINCIPALS + COUNSELORS ACT ON MIDYEAR PROGRAM ADJUSTMENTS
INATOR
PRINCI-
UNSELORS
SCHOOL TO
LTERNA-
AND PRE-
DGETS
11
NORMAL BUDGET APPROVAL PROCESS
12
BOARD ACTION
13
COORDINATOR ASSISTS PRINCIPALS + COUNSELORS TO DEVELOP MILESTONE WORKLOAD SCHEDULES
DISSEMINATES MIDYEAR PROGRAM ADJUSTMENTS
16
DISSEMINATION OF PROGRAM DATA AND GENERAL IMPLEMENTATION ASSISTANCE
NOT APPROVED — BACK FOR REVISION
MIDYEAR CRISIS-INITIATED PROGRAM ADJUSTMENTS FROM DIVISIONAL TASK FORCES

AM DEVELOPMENT AND BUDGETING

school division. Equally important, the goals for each division must be coordinated appropriately with those for the other divisions; (e.g., middle school goals must reflect the elementary and high school goals, since guidance services are part of the middle school student's transition process from elementary to middle school and from middle to high school).

It is very important that the goal and objective development process be viewed as a cooperative effort among all those involved with the guidance program - not as a mandate issued from management. Members of the divisional task forces, especially any counselor chairmen, should maintain a continuous, open exchange of information and ideas throughout the process with the counselors who work with them in the schools. The principals on the task forces should be responsible for keeping other administrators and teachers informed of the ongoing process.

After a hierarchy of goals is set, the divisional task forces can proceed to establish objectives and describe evaluative criteria for the lowest level of goals. Because of the start-up time required in the first year of the guidance management system, the task forces should limit themselves to assigning no more than two objectives for each goal. After a year or two of implementation and evaluation, development of additional objectives can be completed as necessary.

The divisional task forces then undertake the process of program analysis - a review of the current programs and activities carried on in relation to the stated goals and objectives. This review is most important since its purpose is to ensure up-to-date, relative activities; all programs and their activities must relate to one or more objectives, and they must also be appropriate to helping meet the objectives. Programs and activities are thus eliminated, added, or modified by the three task forces.

The initial step of the process is to analyze current programs as they relate to the newly developed objectives. Every objective should be addressed by one or more programs; if not, new programs will have to be developed. Usually, several related objectives will be grouped together and addressed by a particular program: for example, several objectives dealing with different types of student testing (for career awareness, appropriate academic placement, special educational needs) might all relate to the district's elementary pupil appraisal program.

The task forces then define what activities are required for each objective. For example, an objective involving a one-day in-service career awareness training program for teachers in a particular school may require such separate activities as:

- working with the principal on scheduling the program;
- developing the program together with other counselors;
- presenting the day of in-service training; and
- maintaining records on numbers of teachers who attended.

In cases where there are viable alternative approaches to achieving objectives, the task forces describe these alternative activities so that the individual school can eventually choose which activities are most suited to its student body and resources. For example, using the same objective described above, one alternative may suggest hiring outside speakers and renting films for their career awareness in-service day, while another alternative focuses small group discussions using only a school's own staff members. Such alternatives have budget and programmatic implications since the activities taken together indicate a school's emphasis on different guidance areas. The schools decide which programs should receive financial priority over others based upon their perception of the program's importance to the community they serve, including the students.

Once the task forces have defined the specific activities which are required for each objective, like activities are grouped together into program areas. For example, all activities dealing with testing or with maintenance of records would be grouped as part of the new pupil appraisal or records maintenance programs. The groupings represent the type of guidance program activities the district should be performing in order to meet its objectives. These necessary program activities are then compared to the current activities being carried out in each program area. In most cases, if the task forces have been conscientious in developing objectives which attempt to improve the guidance program, the revised program activities will also represent increased effort by the counselors (e.g., more student counseling sessions per year, more parent contacts, shorter, turnaround time for referrals). A revised activity grouping may also represent a new area of counselor effort; hence, a new program to be added to the district's guidance structure. At this point, it may be necessary to modify the tentative program structure by adding or deleting programs. The resulting modification becomes the district's program structure, used for budgeting and overall program evaluation.

The divisional task forces prepare written program descriptions for each program, defining goals, objectives, the criteria by which achievement of objectives are measured, and the program activities which work toward the objectives. These program descriptions are submitted to the district task force to ensure that they are supportive of districtwide guidance goals and other instructional aims. (In the pilot project, the goals and objectives and program structure also went to the Policy Planning Group (PPG) for review in the first year of the system.) After review by the district task force and the PPG, the program structure is submitted to the Board for its approval.

If not approved, the program structure goes back to the program coordinator who returns those unapproved elements to the appropriate group(s) for revision.

After approval by the Board, the program descriptions go to the individual schools for selection among alternative activities and preparation of the guidance budget by school.

At every school, the principal and counselors commit the school to one or more of the alternative program activities described within the programs for that division. For example, each middle school commits itself to one or more of the program activities identified as part of the middle school pupil appraisal program - if a pupil appraisal program has been adopted as part of the overall guidance program structure. Those responsible for guidance at each school - principal (and possibly vice principal), counselor chairman, and counselors - should participate in choosing which activities they believe allow their school, given its type of students, its counseling problems, and its resources, to achieve the guidance objectives.

When each school's activities have been chosen from among the alternatives, the budgeting process can begin. Since districts currently prepare their official budgets in accordance with state-mandated function/object budget categories, additional budget efforts will be required within the guidance function. The principal and counselors at each school will prepare budgets within the guidance function on an object classification within program. (See the cost data sheet, Figure 9). Estimates for these budgets should be developed using budget data from prior years, provided by the business office.

In districts where cost data are not now collected by program, the procedure by which the principal and counselors prepare the school's guidance budget starts when they group their current guidance activities into the original tentative program structure. They then estimate the approximate number of hours

FIGURE 9: PROGRAM BUDGET

School ____________________

Program Name ____________________

Resource Requirements	Current Year		Budget Fiscal Year		
	Actual	Budget	1	2	3
1. Salaries					
2. Emp. Benefits					
3. Purc. Services					
4. Supplies					
5. Capital Outlay					
6. Other					
7. Total Projected Direct Costs					
Revenue Sources					
8. Federal					
9. State					
10. Local					
11. Other					
12. Total Revenue					

Recommended by: ____________________ Date ____________________

____________________ ____________________ Board Adoption ____________________
(Date)

spent annually in performing that group of activities (or program). (Alternatively, they can develop for each current program percentages of total guidance time spent annually.)

Since salaries and employee benefits usually constitute 90 to 95 percent of the guidance program expenditures, the district budget officer should be able to provide them with the approximate cost of their current year's activities by translating the hours (or percentages) spent for each group of activities into estimated dollars. (The budget officer can use an average counselor salary level times hours spent to obtain the approximate cost.)

Once the current year's costs have been estimated, the principal and counselors should assign estimated hours-to-perform for each of the revised activity groupings in the new program structure. These hours can then be translated in the same manner into future costs for each program area. When budgeting for these new activities, however, they should also take into account other significant expenditures beyond salaries and employee benefits (for example, the cost of hiring outside speakers for in-service training, the cost of a large mailing to the community, or the cost of transporting students for a career awareness field trip). Each program area (grouping of similar activities) can thus be assigned estimated budget costs for the next year. The principal and counselors should also be able to project costs for these same program activities for three to five years in the future.

When guidance alternative activities have been chosen and guidance budgets prepared at the individual school level, the program budgets (including program descriptions) go through the normal process of budget submission. In most districts, this procedure would be through the director of elementary or secondary education, to an assistant superintendent, to the superintendent for submission to the Board. If the guidance budgets are approved, they are adopted by the district. (If not approved, the program budgets go back to individual schools for revision.)

Naturally, any changes which take place as a result of administrative or Board action during the budget review process should ultimately agree with the state function/object budget. However, during the budget review process, the individual guidance program budgets are to be evaluated solely on this merit, and no arbitrary budget cuts should be made without investigating the relative impact on guidance programs in terms of desired program results.

Rather than requiring arbitrary budget revisions, the Board may suggest that the principal and counselors at a school choose one of the other alternative program activities developed during program analysis which could accomplish program goals and objectives using different degrees of financial resources. The principal and counselors at each school should cost out the level of financial resources needed at their school for each alternative; these estimates are one basis upon which they select among the alternative activities.

Development of the guidance program budgets takes place only after the usual budget negotiating between the administration and the Board. However, program content and results are not negotiable as has been the case in the traditional function/object mode of budgeting.

In subsequent years, there is an annual reassessment and revision of all goals, objectives, evaluative criteria, programs, program activities, and budgets, following the same basic cycle with the same groups. Periodic input from the user group and annual programmatic evaluations are used to identify new community needs or problem areas that must be addressed. A thorough program analysis should ensure that programs which are no longer useful are eliminated and that new programs are developed or older ones updated in response to new needs.

Each year the program structure, along with all its program budgets, must be approved by the Board before it goes into annual operation.

The final two functions in the program development and budgeting phase involve the preparation of activity and milestone schedules and the optional development of counselor personal performance objectives.

Having received the approved guidance budgets and choices among alternative guidance activities for each school, the program coordinator prepares and maintains a summary report on the guidance program assignments of all schools in the district.

The program coordinator has primary responsibility for developing the operational plan for the guidance management system. In the first year and subsequent years, he takes the objectives, the evaluative criteria, and the revised programs and, together with the principal and counselors at that school, prepares activity and milestone schedules for each school's guidance program. This task first involves an analysis of the evaluative criteria to devise a schedule for monitoring progress toward objective achievement. The analysis requires the coordinator to distinguish between two types of objectives: those which deal with outcomes of the process of delivering guidance services and those which deal with behavioral outcomes.

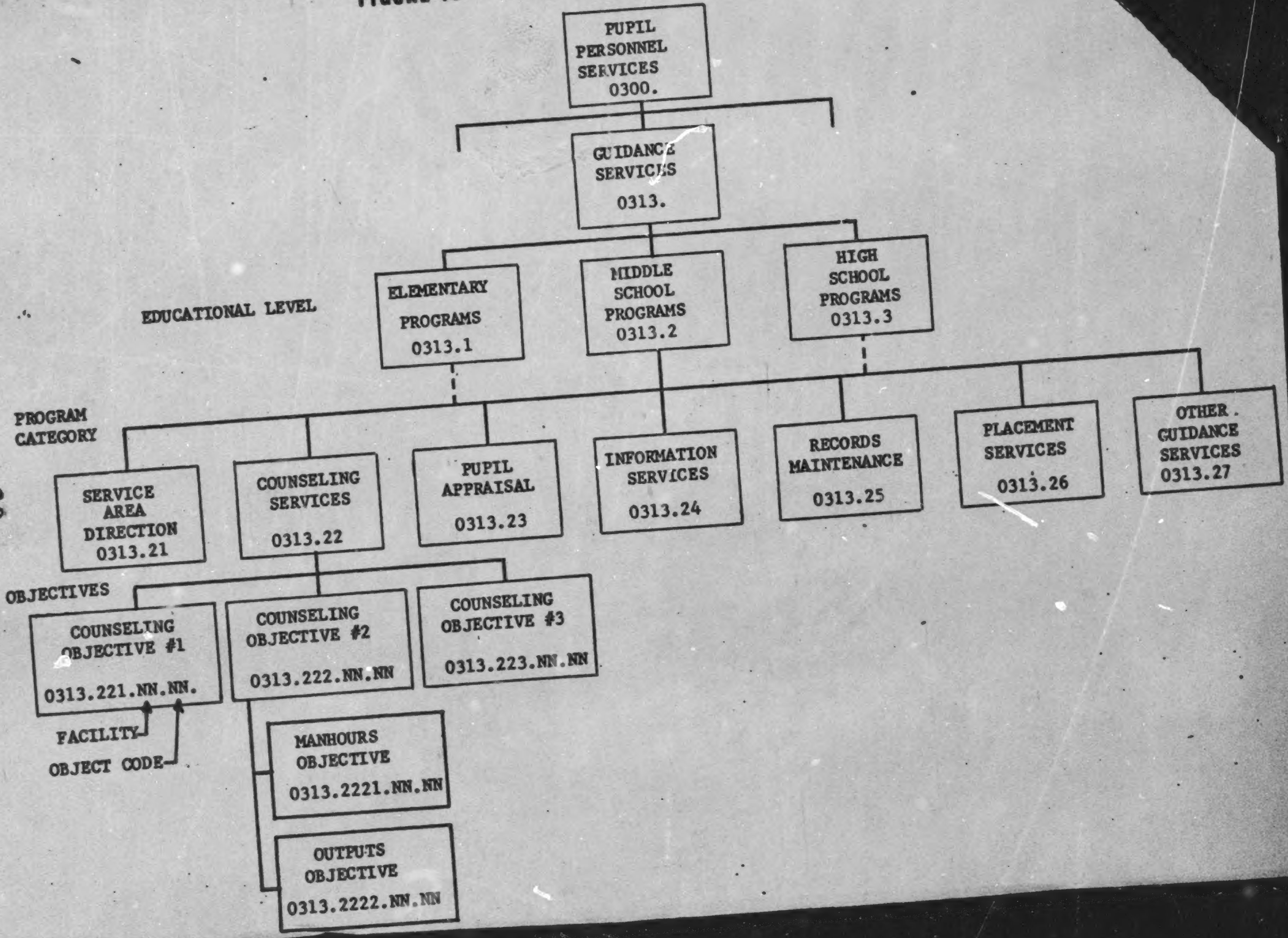
Behavioral objectives generally refer to outcomes in terms of some expected behavioral change in students receiving counseling (e.g., improved self-image, better adjustment to the classroom situation). Because counseling generally has a cumulative effect over time, behavioral objectives relating to counseling (as opposed to guidance as a whole) usually are expressed in terms of outcomes at the end of a long period, perhaps a year.

Process objectives, on the other hand, deal with outcomes in services delivered, such as number of contacts or counseling sessions, hours of operation of a career information library, or days of delay before requested referral letters are sent out. These objectives can generally be measured in increments over shorter time intervals. Therefore, the program coordinator should identify the process objectives in order to develop a time schedule with appropriate milestones. The milestones indicate measurement points throughout the year. (For example, in order to meet an objective of "x" counseling sessions with parents per year, "y" sessions should take place each month.)

In addition to developing the activity and milestone scheduling with the principal and counselors at each school, the program coordinator must put a supportive management information system into effect as a performance data gathering and control tool. The elements and the forms of the information and reporting system, described at length in Section V, require adaptation to the requirements of the various objectives to be met. Although certain types of information are essential for evaluation and decision-making in any district's system, detailed data gathering is based on the evaluative criteria defined by the guidance objectives of each district, and the program coordinator must modify the forms to meet his own reporting needs.

One of the important uses of the information system is to alert the coordinator during the program operations and monitoring phase (Phase III) that a major problem has developed which needs to be addressed immediately by the district's guidance services. Such a significant problem could not wait for the annual year-end evaluation. After the coordinator has identified the problem and the divisional task forces have recommended revisions to the

FIGURE 10: PROGRAM ACCOUNT STRUCTURE CODES

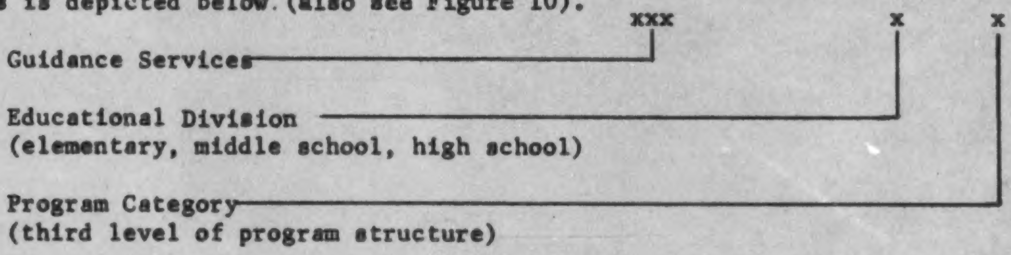

PUPIL PERSONNEL SERVICES 0300.
GUIDANCE SERVICES 0313.
EDUCATIONAL LEVEL
ELEMENTARY PROGRAMS 0313.1
MIDDLE SCHOOL PROGRAMS 0313.2
HIGH SCHOOL PROGRAMS 0313.3
PROGRAM CATEGORY
SERVICE AREA DIRECTION 0313.21
COUNSELING SERVICES 0313.22
PUPIL APPRAISAL 0313.23
INFORMATION SERVICES 0313.24
RECORDS MAINTENANCE 0313.25
PLACEMENT SERVICES 0313.26
OTHER GUIDANCE SERVICES 0313.27
OBJECTIVES
COUNSELING OBJECTIVE #1 0313.221.NN.NN.
COUNSELING OBJECTIVE #2 0313.222.NN.NN
COUNSELING OBJECTIVE #3 0313.223.NN.NN
FACILITY
OBJECT CODE
MANHOURS OBJECTIVE 0313.2221.NN.NN
OUTPUTS OBJECTIVE 0313.2222.NN.NN

program structure to deal with the crisis, action on the problem returns to Phase II, Program Development and Budgeting (see Figure 8). Here again, the principals and counselors, with assistance from the coordinator, select from among new alternative program activities (if there are alternatives) and rework milestone workload schedules. The remainder of the phase then proceeds as already described.

The budget of the guidance management system also requires a supportive coding system. The purpose of the budget coding system is to provide a district with the capability to identify, collect and assess data on the cost of performing guidance activities at the program level.

Implementation of a budget coding system for the guidance management system requires developing account code structures at level three of the program structure, (Level three, as we discussed in Section III, includes guidance functions which undergird the three educational divisions. Also see Figure.2). Since most districts in the Commonwealth currently utilize codes to record expenditures according to program or function, such codes can be expanded to include program categories at the third level of the program structure.

In the pilot district, we expanded the 1974-1975 budget code for guidance services at each educational level to develop program account code structures. This expansion consisted of adding one digit to identify each category of service at the program structure's third level. The interrelationship of the digits is depicted below (also see Figure 10).


xxx
x
x
Guidance Services
Educational Division
(elementary, middle school, high school)
Program Category
(third level of program structure)

Since the pilot district's accounting system provides for the classification of expenditures by object and facility, the introduction of a program category code within the accounting system provides for the classification of the same expenditures by those activities which comprise the guidance program effort.

The coding system provides a district with the flexibility to collect and analyze program costs and/or expenditure data at the following planning and budgeting levels:

- district-wide guidance program,
- educational division within district program,
- building within an educational division, and
- individual programs in a particular building within an educational division.

Figure 10 illustrates the various levels of assigning codes to a typical guidance program structure.

The coding system must be consistent with a district's chart of accounts. Therefore, it is necessary for a district to code guidance function documents which are used as input to the accounting system. Necessary accounting records which would require coding include:

- payroll records,
- purchase requisitions and orders,
- stores requisitions, and
- journal entries.

Depending on the size of a district's guidance program (e.g., facilities, personnel and services), a district will have to determine whether it is necessary to computerize the processing of financial information necessary to support the guidance management system. For the pilot district, manual support of the information processing requirements was impractical. Accordingly, since the pilot district is now in the process of revising its accounting system for computerization, the guidance program account codes were assigned to accomodate automation.

In addition to coding the program structure to collect financial information, the pilot district expanded its budget codes to enable it to capture non-financial data. The collection of non-financial data requires the coding of program objectives contained within a program category. Each objective code number is extended to include planned manhours and outputs associated with the activities to achieve each program objective. The objective code is developed by adding an additional digit to the program code and expanding that code field to include facility and object and manhour and output digits. (See objective level in Figure 10.) Since non-financial data can be collected and aggregated similarly to financial information previously discussed, a comparative analysis of program performance can be conducted by comparing cost against results. Thus, the coding of non-financial information provides a district with another criterion (in addition to costs) to measure performance as a means of evaluating relative effectiveness among the various program service categories. The evaluation process of the guidance management system is described in a later part of this section.

Section V discusses what and how both financial and non-financial data are entered and processed in the guidance management system.

Lastly, Phase II may also include the development of personal performance objectives for each counselor as part of an optional personnel performance system, which could be built into the overall guidance management system. Every counselor sits down each year with his principal and develops a number of personal objectives for the coming year (and for shorter or longer periods, such as six months or two years). These objectives are written down, mutually agreed upon, and are supportive of the overall guidance objectives for the school. The objectives ultimately become part of the counselor's annual career counseling session and evaluation process.

PHASE III: PROGRAM OPERATION AND MONITORING

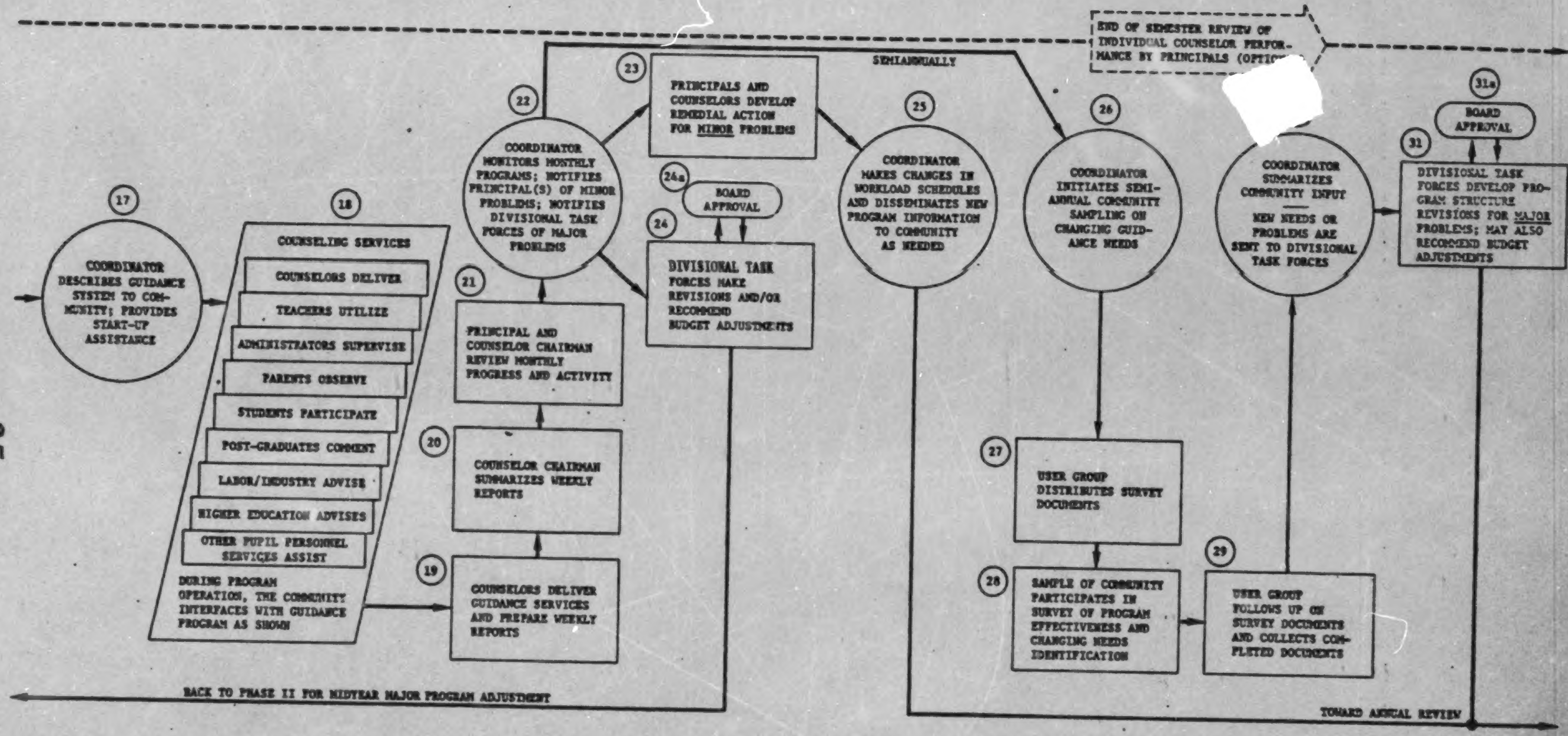
Once the activity and milestone schedules are prepared, the guidance management system begins to operate. The coordinator has the responsibility for overseeing the actual implementation by disseminating the appropriate information on the system to the various involved groups.

The other basic function in this phase is monitoring. Monitoring, which is a form of short-term evaluation, ensures that cost, schedules, and delivery of service (process) milestones are achieved. The basic actions involved in monitoring include:

- monthly input of financial and process data from the system and analysis of these data for schedule and budgeting problems;
- reporting of progress and development of alternative schedule adjustments;
- semiannual sampling of community users on new needs and reporting of this information; and
- optional end of semester counselor performance review by principal.

(The flow of work in Phase III is shown in Figure 11.)

The coordinator first distributes to direct participants--counselors, principals, vice principals, where applicable, and teachers--complete information on their responsibilities as part of the system. This information would include all adopted program budgets, with goals, objectives, evaluative criteria, and fund and resource allocations for each program assigned to their schools. The program coordinator then instructs direct participants in the mechanics of reporting and filling out forms, and analyzing and acting on monthly and yearly reports coming to them.



END OF SEMESTER REVIEW OF INDIVIDUAL COUNSELOR PERFORMANCE BY PRINCIPALS (OPTIC
SEMIANNUALLY
17
COORDINATOR DESCRIBES GUIDANCE SYSTEM TO COMMUNITY; PROVIDES START-UP ASSISTANCE
18
COUNSELING SERVICES
COUNSELORS DELIVER
TEACHERS UTILIZE
ADMINISTRATORS SUPERVISE
PARENTS OBSERVE
STUDENTS PARTICIPATE
POST-GRADUATES COMMENT
LABOR/INDUSTRY ADVISE
HIGHER EDUCATION ADVISES
OTHER PUPIL PERSONNEL SERVICES ASSIST
DURING PROGRAM OPERATION, THE COMMUNITY INTERFACES WITH GUIDANCE PROGRAM AS SHOWN
19
COUNSELORS DELIVER GUIDANCE SERVICES AND PREPARE WEEKLY REPORTS
20
COUNSELOR CHAIRMAN SUMMARIZES WEEKLY REPORTS
21
PRINCIPAL AND COUNSELOR CHAIRMAN REVIEW MONTHLY PROGRESS AND ACTIVITY
22
COORDINATOR MONITORS MONTHLY PROGRAMS; NOTIFIES PRINCIPAL(S) OF MINOR PROBLEMS; NOTIFIES DIVISIONAL TASK FORCES OF MAJOR PROBLEMS
23
PRINCIPALS AND COUNSELORS DEVELOP REMEDIAL ACTION FOR MINOR PROBLEMS
24a
BOARD APPROVAL
24
DIVISIONAL TASK FORCES MAKE REVISIONS AND/OR RECOMMEND BUDGET ADJUSTMENTS
25
COORDINATOR MAKES CHANGES IN WORKLOAD SCHEDULES AND DISSEMINATES NEW PROGRAM INFORMATION TO COMMUNITY AS NEEDED
26
COORDINATOR INITIATES SEMI-ANNUAL COMMUNITY SAMPLING ON CHANGING GUIDANCE NEEDS
27
USER GROUP DISTRIBUTES SURVEY DOCUMENTS
28
SAMPLE OF COMMUNITY PARTICIPATES IN SURVEY OF PROGRAM EFFECTIVENESS AND CHANGING NEEDS IDENTIFICATION
29
USER GROUP FOLLOWS UP ON SURVEY DOCUMENTS AND COLLECTS COMPLETED DOCUMENTS
COORDINATOR SUMMARIZES COMMUNITY INPUT
NEW NEEDS OR PROBLEMS ARE SENT TO DIVISIONAL TASK FORCES
31a
BOARD APPROVAL
31
DIVISIONAL TASK FORCES DEVELOP PROGRAM STRUCTURE REVISIONS FOR MAJOR PROBLEMS; MAY ALSO RECOMMEND BUDGET ADJUSTMENTS
BACK TO PHASE II FOR MIDYEAR MAJOR PROGRAM ADJUSTMENT
TOWARD ANNUAL REVIEW

FIGURE 11: PHASE III — PROGRAM OPERATION AND MONITORING

In addition, the coordinator should be sure that everyone at the schools, whether directly involved or not, is made aware that the guidance management system is in operation. Students, support staff, and other professional staff should understand the purpose of the system and what to expect from it in terms of services and information.

A related task of the coordinator in this phase is to disseminate to the user group (and, through them, to the community) information about the adopted guidance goals, objectives, programs and program budgets. For example, parents should know about the guidance programs at their children's school(s); representatives of local higher education institutions should be aware of the high school guidance programs. The community as a whole should be kept informed throughout the development of the system so that its members are aware of the responsiveness of guidance services to community needs and how its resources are being utilized.

The monitoring portion of Phase III involves counselors, principals, the guidance coordinator, and possibly the divisional task forces. As the guidance management system operates, the counselors will prepare weekly summary reports of counseling activities (see Section V, Figure 19) to identify the type of counseling contact or other guidance activity and the amount of time spent on each. These individual reports are summarized each week by the counseling chairman, who reviews them with the principal (or vice principal designated in charge of the guidance program); he, in turn, prepares a monthly summarization of the hours spent in each guidance program area for his school. This monthly report goes to the program coordinator.

(In the case of elementary counselors assigned to more than one school, they submit their weekly activity reports directly to the guidance program coordinator, with copies sent to the principal of each school where they provide guidance services.)

With regard to monitoring progress of the management system throughout the year, the program coordinator recieves monthly data on costs from the business office and data on the incremental outcomes of process objectives from the principals' reports (e.g., there were "x" number of parent contacts at school "y" last month.) The program coordinator collects, sorts, and organizes the information received to determine whether the guidance services are being delivered on schedule (in terms of their milestones), whether there are any problems or difficulties with the programs. To identify problem areas, the coordinator compares actual to planned expenditures from the budget, using a monitoring form such as that shown in Figure 18.

When a problem is identified, (e.g., a school which is committed to a parent counseling objective has few recorded contacts to date), the coordinator notifies the involved principal or principals. The principal, in turn, should decide with his counselors what corrective action needs to be taken and inform the coordinator.

Corrective action for problems in the guidance system varies widely depending on the type of problem. For example, if there are indications of student reluctance to use counseling services, the principals and counselors might decide to conduct a formal or informal mini-survey of students to find out why they hesitate to use counseling and with these findings determine how to remedy the situation. In a different case, an evaluative criterion for a placement services objective may have specified an average turnaround time of three days for each request for college transcripts. If, after three months, the system shows that it is taking more than a week for each transcript to be mailed out, the principal and counselors may decide to give support staff or student aides a larger role in preparation of transcripts and letters of recommendation.

Normally, problems identified by the coordinator are referred only to the involved principal or principals. However, if the problem is major and/or widespread enough, the program coordinator notifies not only the principals but also the relevant divisional task force in case it is necessary to revise the goals, objectives, or evaluative criteria of the program. In that case, the revisions return to the coordinator and the principals and counselors at each school to make adjustments in the milestone schedules (See Phase II). (Any major revisions to the program structure would have to be approved by the Board of School Directors.)

Changes in schedule, budgets, or activities must be considered and agreed upon in view of the needs of the situation. Once a change in program or schedule is made, any others in the school actually affected by the change--teachers, students, other pupil personnel, and support staff--are notified of the change and its implications for them.

Short-term program adjustments require an adjustment to the affected guidance program budgets for input to the guidance management system. Program failure to any significant degree of magnitude warrants a reordering of financial resources in order to initiate immediate corrective action.

As part of the semiannual activities of the program operation and monitoring phase, a selective sampling survey is conducted of the community to identify any significant change in guidance needs. Again, the user group acts as the liaison, sending out questionnaires to a small sampling of each type of guidance "consumer" in the community and conducting follow-up and collection of the questionnaires. Another method of conducting the survey would be to sample half the community guidance user groups at the end of the other semester. Thus, on a sample basis, teachers, administrators, students, parents, other pupil personnel staff, and local representatives of labor and industry and higher education would all have at least semiannual input into the system.

It should be stressed that this semiannual survey is not supposed to replace regular, open communication between the guidance program coordinator and those community representatives who traditionally have frequent contact with the district's guidance services. The coordinator should maintain his continual, informal relationships with the local juvenile authorities, the state employment office, community mental health and social service agencies, and others to keep him informed of guidance program effectiveness and changes in guidance needs - without relying on any formal surveys or sampling.

After receiving input from the community, the coordinator summarizes the community needs data and advises principals of any new needs or problems which should require revisions to program commitments, activities, or budgets.

If the semiannual survey reveals major new needs, the coordinator may send this information to the appropriate divisional task forces for revisions to program goals and objectives or budgets. For example, a survey of local industry may reveal that an employer which normally hires many of the district's high school graduates is going to lay off a large number of workers. The high school divisional task force might want to alter some of its evaluative criteria and program activities to reflect a vocational counseling shift away from local employers to more distant job markets. Again, any major changes to the program structure by the divisional task forces would have to be submitted to the Board for approval.

The final action in the program operation and monitoring phase is part of the optional personnel performance system: an end-of-semester career counseling and performance review between each counselor and principal. If the principal chooses to conduct these sessions at the end of the semester (as well as annually), this process becomes part of the overall counselor evaluation process and establishes a basis for providing input in setting career objectives for the counselor. The review moreover allows the counselor and the principal to analyze the counselor's short-term successes and deficiencies and plan for improvement.

PHASE IV: EVALUATION

As previously discussed in Section III, the guidance management system is a model which allows a school district to improve the effectiveness and performance of a guidance program. To determine program results in accordance with either of the program improvement criteria requires an evaluation. In the case of effectiveness, which is built into the system, programs are evaluated to determine the impact (measurable change in problem conditions) they have on an unmet need or adverse situation. This task requires a district to commit sizable manpower and financial resources to conduct a comprehensive needs assessment. Through this assessment, problem conditions are identified from which program objectives are concretely and quantitatively developed into measurable dimensions to define such conditions. Because of the resource requirement, we do not believe a district initially will have the capability to undertake effectiveness evaluation.

On the other hand, we believe that performance evaluation initially can be undertaken by a district. This lower order of evaluation, which also is currently built into the system, is evaluation of whether the various categories of the program structure are meeting their stated objectives. This process requires that planned outputs and budgeted expenditures of each program category be examined annually to determine which programs are best performing as measured by the cost of achieving specifiable outcomes. Hence the evaluative phase of the guidance management system, as discussed in the remainder of this section, addresses what and how the system enables district administrators to account for guidance program accomplishments and costs to facilitate decision making. The work flow of this phase is illustrated on Figure 12.

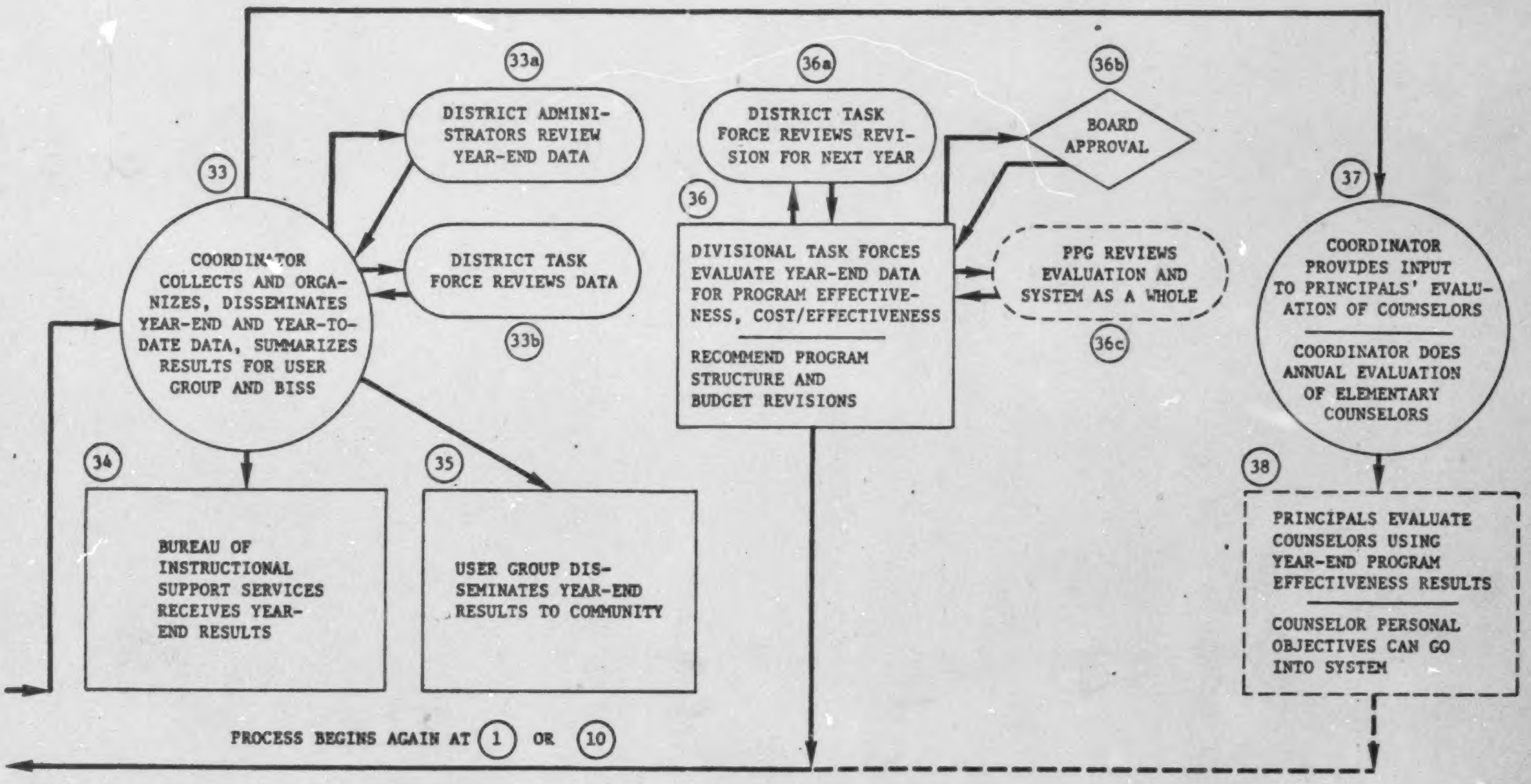

33
COORDINATOR COLLECTS AND ORGANIZES, DISSEMINATES YEAR-END AND YEAR-TO-DATE DATA, SUMMARIZES RESULTS FOR USER GROUP AND BISS
33a
DISTRICT ADMINISTRATORS REVIEW YEAR-END DATA
33b
DISTRICT TASK FORCE REVIEWS DATA
34
BUREAU OF INSTRUCTIONAL SUPPORT SERVICES RECEIVES YEAR-END RESULTS
35
USER GROUP DISSEMINATES YEAR-END RESULTS TO COMMUNITY
36
DIVISIONAL TASK FORCES EVALUATE YEAR-END DATA FOR PROGRAM EFFECTIVENESS, COST/EFFECTIVENESS
RECOMMEND PROGRAM STRUCTURE AND BUDGET REVISIONS
36a
DISTRICT TASK FORCE REVIEWS REVISION FOR NEXT YEAR
36b
BOARD APPROVAL
36c
PPG REVIEWS EVALUATION AND SYSTEM AS A WHOLE
37
COORDINATOR PROVIDES INPUT TO PRINCIPALS' EVALUATION OF COUNSELORS
COORDINATOR DOES ANNUAL EVALUATION OF ELEMENTARY COUNSELORS
38
PRINCIPALS EVALUATE COUNSELORS USING YEAR-END PROGRAM EFFECTIVENESS RESULTS
COUNSELOR PERSONAL OBJECTIVES CAN GO INTO SYSTEM
PROCESS BEGINS AGAIN AT ① OR ⑩

FIGURE12: PHASE IV — EVALUATION

The evaluation procedure begins with the flow of annual program, process, and financial data to the program coordinator. As described earlier under Phase III, behavioral objectives are generally linked to an annual timeframe for their outcomes--usually, expected behavioral changes in students after receiving counseling. Because of this counseling time element and because other objectives may have evaluative criteria requiring time-consuming data gathering (e.g., a community survey) some data for evaluation are collected only at the end of the year.

The key process of the evaluation phase of the system is collecting and analyzing program data and providing useful information to judge decision alternatives. These processes place a strong requirement on The Guidance Information and Reporting System which is discussed later in Section V.

Collection and Analysis of Data

Based on our experience with the pilot district, these processes of the evaluative phase are supported by the following actions:

- input of annual data from system;
- annual program and financial monitoring and data summarization;
- annual program performance reporting;
- annual program evaluation and cost/benefit determination;
- annual personnel performance evaluation; and
- program adjustments and revisions.

The foregoing actions will require the program coordinator to collect and organize the evaluation information for dissemination to those groups who participated in the development and operation phases.

The program coordinator receives both the program data collected annually (at year-end) and the cumulative year-to-date financial and process monitoring data he has been receiving each month. He summarizes the data for reporting to the various groups. (Figure 24 in Appendix A shows the format the coordinator uses in organizing annual program data.)

The three divisional task forces receive program information, as do the district task force and district administrators (e.g., the superintendent, principals and assistant superintendents). A simplified version of the summary data should also be sent to the user group for dissemination to the community (accompanied by the participant/beneficiaries contact summary, Figure 23) and to the state Bureau of Instructional Support Services.

The task forces examine the program data and ask questions concerning the past year's implementation. For example:

- Have the guidance objectives been met quantitatively and qualitatively? If not, which objectives presented problems?
- Which programs or program activities seem to be responsible for the lack of success?
- Were some of the failures due to "people" problems? (Are some of the counselors contributing to the lack of success?)

The answers to such questions indicate problem areas for additional in-depth analysis. In each case where significant difficulties are identified, two other questions can be asked:

- Were cost and/or schedule deviations responsible for the lack of delivery of the guidance services within the program?
- Were the services delivered according to schedule but the objectives not met because the basic concept upon which the service was based is incorrect?

For example, certain types of career counseling for students may have specified the use of audiovisual aids for group counseling. If the cost of the equipment and materials rose unexpectedly so that they could not be used in the program, this factor might be responsible for a failure in the on-schedule delivery of this service to the students. In another example, enough audiovisual equipment was available and enough students attended the group sessions but a qualitative evaluation indicated that the results of the sessions were not satisfactory. The basic assumptions and purposes for which the audiovisual group career counseling sessions were designed would have to be reexamined.

If cost and schedule problems turn out to have caused the lack of success, the preceding year's program structure and financial plan should be reviewed and revised to develop new planned progress milestones for the coming year.

If the service provided was unequal to the objectives it was to achieve, the basic concept upon which the service was developed should be reexamined and the preceding year's goals and objectives relating to that program should be revised accordingly for the coming year.

Various alternative methods of existing program delivery, as well as new programs, should be considered in the case of undesired results. Naturally, financial resource requirements would be developed for each. The optimum package of guidance programs would consist of those guidance programs responsive to district needs, goals and objectives, and delivered at the lowest cost possible within the limited financial resources available to the district. This kind of assessment of programs is part of the annual program evaluation.

Providing Information for Decision Alternatives

Since the annual evaluation involves all groups who participated in earlier planning and development phases, these groups should be provided with information on program accomplishments and costs to obtain their responses/inputs on the degree to which the plans succeeded. The groups involved in this process include:

- Superintendent and Board of Directors,
- District Task Force,
- Divisional Task Forces, and
- User Group.

The divisional task forces perform the annual program evaluation and, based upon this evaluation, they make recommendations for changes in elements of the program structure. These recommendations are reviewed by the district task force to ensure that the changes will continue to support districtwide guidance goals.

In the case of the pilot district, the revisions are also sent to the Policy Planning Group for review. The recommendations then go to the Board of School Directors for final approval. The user group would again be used as the vehicle for widespread dissemination to the community of the changes to be made in guidance services for the coming year.

Since the determination of program successes or failures is linked to the efficiency in which guidance services are delivered, information about how well counselors achieved their personal goals may have a significant influence on program performance. As an option the management system includes a process for evaluating counselor performance vis-a-vis career development goals.

Accordingly concurrent with the annual program evaluation task performed by the divisional task forces is the counselor personnel performance evaluation by the principals with input from the guidance program coordinator. The personnel evaluations begin with the coordinator providing each middle and high school principal with his input from the guidance program coordinator. The personnel evaluations begin with the coordinator providing each middle and high school principal with his input into the individual evaluations of their counselors. (On the elementary school level, the coordinator performs the annual counselor evaluations himself with some input from the principals in whose schools the counselor functions.)

Middle and high school principals have the opportunity of day-to-day contact with and knowledge of the counselors and receive feedback from teachers and students; the principals also have the ultimate authority in the personnel evaluation process. However, the guidance program coordinator has valuable guidance expertise as a necessary component to a complete performance evaluation.

Ideally the guidance management system would permit the individual counselor to be accountable for his part in the success or failure of the guidance program at his school. Each counselor would set annual personal objectives which, if met, would help in meeting guidance program objectives, and his annual personnel performance evaluation would be partly based on how well he met these personal objectives.

Data for measuring each counselor's progress toward meeting his objectives would also be collected within the guidance management system, so that it would be possible to identify the relationship of personnel and program performance. If certain counselors were not performing adequately and thus were contributing to the lack of overall success of a school's guidance program, the principal could evaluate them accordingly.

Unfortunately, the personnel performance evaluation segment of the system requires both a computer capability to handle the large quantity of data and, more important, union acceptance of the concepts of accountability and personnel performance objectives. Since many districts cannot meet either of these requirements, in most cases the guidance management system will have to be implemented without personnel evaluation function tied directly into the program effectiveness function of the system. Instead, personnel performance will be assessed by the principal (with input from the guidance program coordinator) based on observations and feedback from teachers and students.

Actual program adjustment and revision is the final step in the yearly guidance management system cycle and involves an overall general examination of the validity of the program structure based on the past year's implementation experience and any new condition that may have arisen during the year and which needs to be addressed.

For example, during the year, the drop-out problem (which had previously been small) may suddenly reach large proportions, and new programs and activities may have to be designed to deal with it. Such changes in existing conditions may require the task forces to make appropriate changes in goals and objectives and the budget as well.

When this last stage in the guidance management system has been reached, the preceding year's cycle will have been completed and the following year's implementation will have begun. Thus, program evaluation leads to redefinition of the existing condition of the guidance services and a redefinition of the goals and objectives upon which the program structure is based. This cycle is repeated each year in the life of the guidance services program.

V - GUIDANCE INFORMATION AND REPORTING SYSTEM

The Guidance Information and Reporting System (GIRS) defines and standardizes the processes necessary to collect, analyze, and disseminate data relevant to delivery and management of guidance services. Schematically, the information and reporting system parallels and is part of the guidance management system and serves as its information base. The system collects data on guidance activities and procedures and reports on guidance program accomplishment, the cost of accomplishment, and comparison of accomplishment against planned activity.

A schematic flowchart of guidance information progressing through the reporting system is presented in Figure 13. (The participants in each step of the guidance management system were already described in Sections III and IV.) Forms referred to in the reporting system are presented in Figures 14 through 25; these same forms are included, along with instructions for their use, in Appendix A.

There are two important factors relating to the forms included in this section. They were designed basically with the pilot district in mind and are sample forms to be modified and expanded or simplified as needed by other implementing districts. Each form should be examined in terms of the needs and capabilities of the district and revised accordingly.

The second factor is the sophistication of the district's computer capability. It is obvious that a district wanting to accumulate programmatic and fiscal data on a hundred or more guidance objectives will have to collect and report these data by computer. Districts with less sophisticated computerization should begin implementing the guidance information and reporting system using only a few objectives (three or four at each educational division). In this way, participants in the guidance program gain experience in reporting and

GUIDANCE INFORMATION AND R

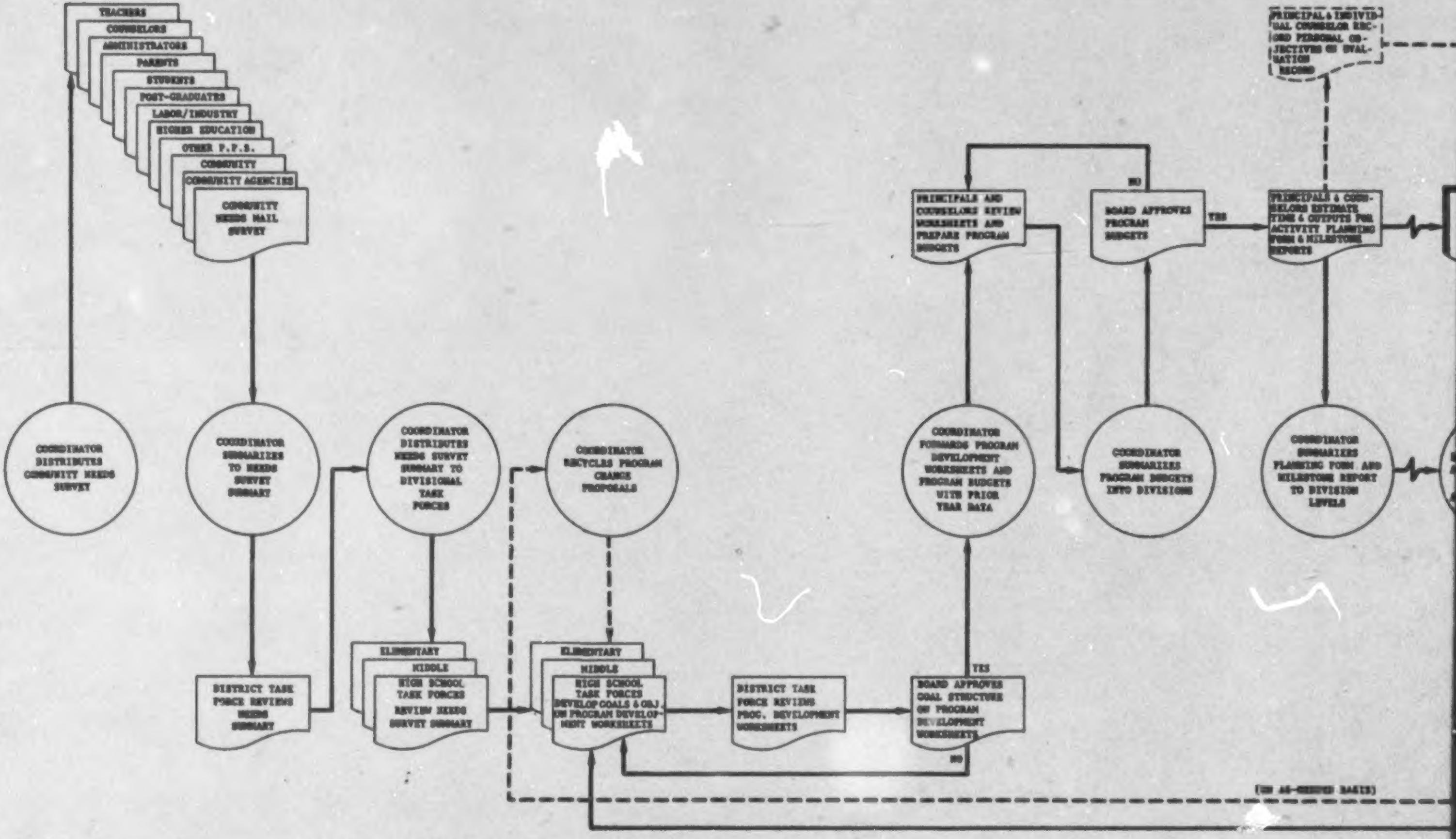

TEACHERS
COUNSELORS
ADMINISTRATORS
PARENTS
STUDENTS
POST-GRADUATES
LABOR/INDUSTRY
HIGHER EDUCATION
OTHER P.P.S.
COMMUNITY
COMMUNITY AGENCIES
COMMUNITY NEEDS MAIL SURVEY
COORDINATOR DISTRIBUTES COMMUNITY NEEDS SURVEY
COORDINATOR SUMMARIZES TO NEEDS SURVEY SUMMARY
DISTRICT TASK FORCE REVIEWS NEEDS SUMMARY
COORDINATOR DISTRIBUTES NEEDS SURVEY SUMMARY TO DIVISIONAL TASK FORCES
ELEMENTARY
MIDDLE
HIGH SCHOOL TASK FORCES REVIEW NEEDS SURVEY SUMMARY
COORDINATOR RECYCLES PROGRAM CHANGE PROPOSALS
ELEMENTARY
MIDDLE
HIGH SCHOOL TASK FORCES DEVELOP GOALS & OBJ. ON PROGRAM DEVELOPMENT WORKSHEETS
DISTRICT TASK FORCE REVIEWS PROG. DEVELOPMENT WORKSHEETS
BOARD APPROVES GOAL STRUCTURE OF PROGRAM DEVELOPMENT WORKSHEETS
YES
NO
COORDINATOR FORWARDS PROGRAM DEVELOPMENT WORKSHEETS AND PROGRAM BUDGETS WITH PRIOR YEAR DATA
PRINCIPALS AND COUNSELORS REVIEW WORKSHEETS AND PREPARE PROGRAM BUDGETS
NO
BOARD APPROVES PROGRAM BUDGETS
YES
COORDINATOR SUMMARIZES PROGRAM BUDGETS INTO DIVISIONS
PRINCIPAL & INDIVIDUAL COUNSELOR RECORD PERSONAL OBJECTIVES ON EVALUATION RECORD
PRINCIPALS & COUNSELORS ESTIMATE TIME & OUTPUTS FOR ACTIVITY PLANNING FORM & MILESTONE REPORTS
COORDINATOR SUMMARIZES PLANNING FORM AND MILESTONE REPORT TO DIVISION LEVELS
(ON AS-NEEDED BASIS)

FIGURE 13

MATION AND REPORTING SYSTEM

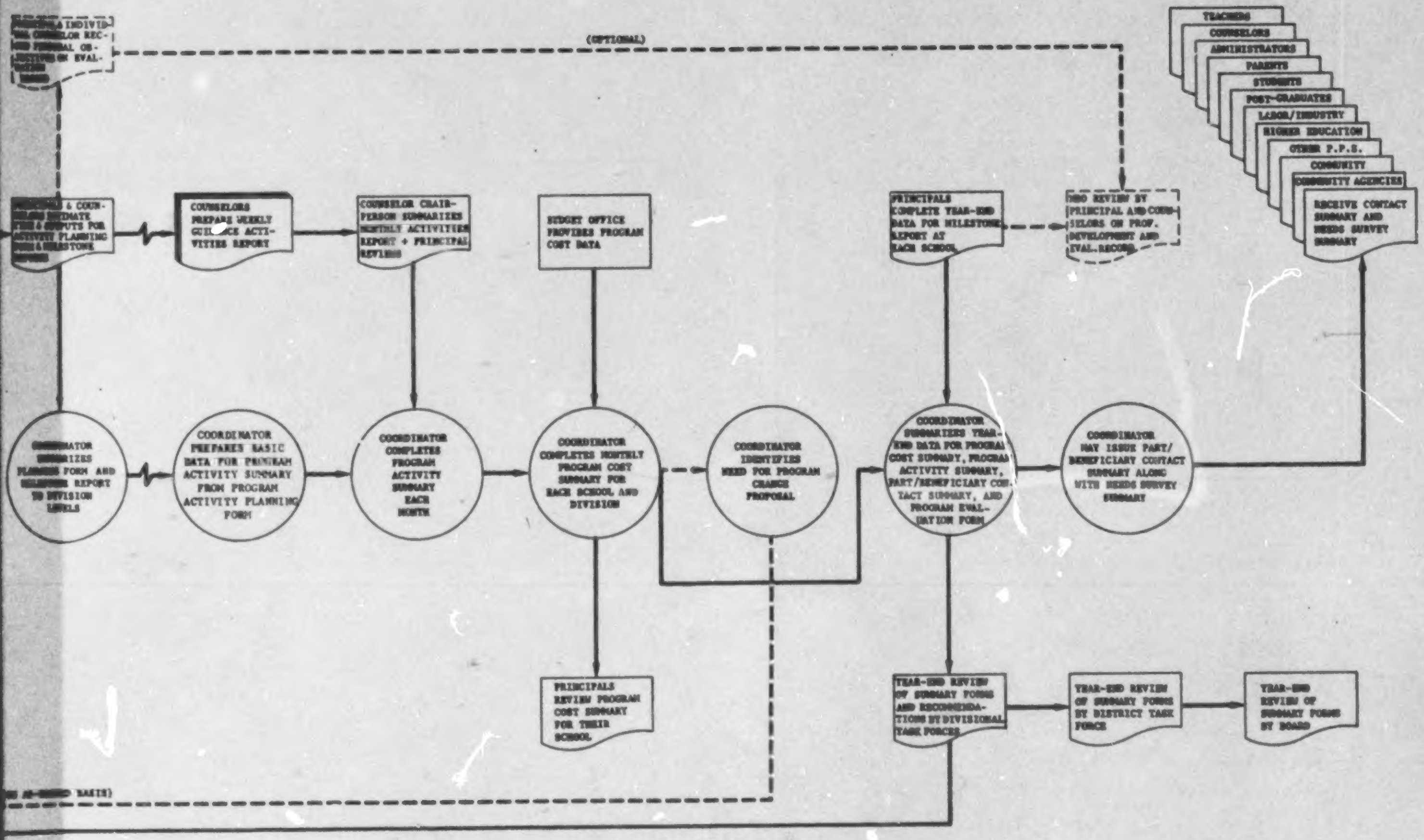

(OPTIONAL)
& INDIVID- COUNSELOR REC- PERSONAL OB- ON EVAL-
& COUN- ESTIMATE & OUTPUTS FOR ACTIVITY PLANNING & MILESTONE
COUNSELORS PREPARE WEEKLY GUIDANCE ACTIVITIES REPORT
COUNSELOR CHAIRPERSON SUMMARIZES MONTHLY ACTIVITIES REPORT + PRINCIPAL REVIEWS
BUDGET OFFICE PROVIDES PROGRAM COST DATA
PRINCIPALS COMPLETE YEAR-END DATA FOR MILESTONE REPORT AT EACH SCHOOL
MBO REVIEW BY PRINCIPAL AND COUNSELORS ON PROF. DEVELOPMENT AND EVAL. RECORD
TEACHERS
COUNSELORS
ADMINISTRATORS
PARENTS
STUDENTS
POST-GRADUATES
LABOR/INDUSTRY
HIGHER EDUCATION
OTHER P.P.S.
COMMUNITY
COMMUNITY AGENCIES
RECEIVE CONTACT SUMMARY AND NEEDS SURVEY SUMMARY
ATOR RIZES FORM AND REPORT TO DIVISION LEVELS
COORDINATOR PREPARES BASIC DATA FOR PROGRAM ACTIVITY SUMMARY FROM PROGRAM ACTIVITY PLANNING FORM
COORDINATOR COMPLETES PROGRAM ACTIVITY SUMMARY EACH MONTH
COORDINATOR COMPLETES MONTHLY PROGRAM COST SUMMARY FOR EACH SCHOOL AND DIVISION
COORDINATOR IDENTIFIES NEED FOR PROGRAM CHANGE PROPOSAL
COORDINATOR SUMMARIZES YEAR-END DATA FOR PROGRAM COST SUMMARY, PROGRAM ACTIVITY SUMMARY, PART/BENEFICIARY CONTACT SUMMARY, AND PROGRAM EVALUATION FORM
COORDINATOR MAY ISSUE PART/BENEFICIARY CONTACT SUMMARY ALONG WITH NEEDS SURVEY SUMMARY
PRINCIPALS REVIEW PROGRAM COST SUMMARY FOR THEIR SCHOOL
YEAR-END REVIEW OF SUMMARY FORMS AND RECOMMENDATIONS BY DIVISIONAL TASK FORCES
YEAR-END REVIEW OF SUMMARY FORMS BY DISTRICT TASK FORCE
YEAR-END REVIEW OF SUMMARY FORMS BY BOARD
AS-NEEDED BASIS)

FIGURE 13

analyzing guidance data while the district has time to develop the necessary data processing capability for a full-scale implementation.

In sequence with the phases of the guidance management system, this section on the information and reporting system defines the tasks and procedures that comprise the data collection and reporting phases which support the overall guidance management system.

PHASE I: NEEDS SURVEY

As described in Section IV, the needs survey is designed to determine what district guidance services the community (as the ultimate users of those services) views as important and/or necessary. The survey would probably be conducted every three years. To begin the needs survey process, the guidance program coordinator distributes the Community Needs Mail Survey (Figure 7) to the user group, which acts as an ongoing liaison with the community it represents. The coordinator advises the representatives how to use the mail survey, its purpose and importance, and the timeframe for completion of the survey, and remains available to the user group to answer questions and encourage as large a response as possible.

During Phase I, the coordinator is also assembling data on prior year guidance program accomplishments for dissemination in future phases.

PHASE II: PROGRAM DEVELOPMENT AND BUDGETING

Needs survey information is summarized on the Needs Survey Summary (Figure 14) by the coordinator. The summary is a matrix which shows the ranking or relative importance assigned to each guidance service by each segment of the community surveyed. The coordinator will use the summary to indicate to those involved in the guidance system what various community segments expect from the district's guidance program. This information is especially important in setting district guidance goals and in assessing the program's achievement of those goals. After completion of the summary, the coordinator calls a meeting of the district task force to review and discuss the needs survey and to identify, with input from the business manager, operating and budgetary constraints to guidance programs. The results of the survey and the list of constraints form the basis for their development of district goals.

The divisional task forces complete development of their program structures - including goals and subgoals, objectives, programs, and alternative program activities - and the chairman of each task force prepares the Program Development Worksheet (Figure 15). The worksheet permits schematic illustration of the goal structure for each division, indicating which goals and objectives are supportive of specific higher level goals and which programs and activities relate to which objectives. (The format shown in Appendix B is based on the pilot district; other districts may have greater or fewer levels of goals and would have to expand or reduce the format, accordingly.)

The completed worksheets, which detail the revised program structure for each division, are submitted for review to the district task force (and policy planning group in the pilot district) and to the Board for approval. The coordinator then sends the approved Program Development Worksheets, one for each educational division, to each school in that division, along with blank copies of the Program Budget (Figure 9), the Program Activity Planning Form (Figure 17), and the Program Milestone Report (Figure 18). These forms will provide the basis for selecting guidance program activities and developing the guidance program budget and planning milestones at each school. (It should be noted that the guidance program coordinator is responsible for having all forms printed and for having basic information, such as program names and code number pre-printed on the forms prior to distribution.)

Principals and counselors at each school review the divisional goal structure, objectives, programs, and activities. They then decide which alternative activities their school will perform to meet the objectives. (All schools are responsible for achieving the objectives set by their divisional task force; the program activities to achieve those objectives may vary from school to school.)

Based on the alternative activities chosen by each school, the principal and counselors prepare the school's guidance program budget (shown in Figure 9), projected for a minimum of three years. As discussed in the narrative for Phase II of the model, these estimates are generally based on approximate costs of past years' guidance activities, supplied by the business manager, related to the different or additional activities projected for the coming year.

The guidance program budgets from each school are submitted to the coordinator who summarizes them into the three educational levels. The elementary, middle, and high school guidance budgets are then submitted for approval through the normal budget process, ending in final Board approval.

After the principal and counselors at each school develop their school's guidance budget, they complete the Program Activity Planning Form (Figure 17) and the Program Milestone Report (Figure 18). They review the objectives for their division shown on the Program Development Worksheet and estimate the time and activity level they feel will be necessary to accomplish each objective. Time estimates on the Program Activity Planning Form are made in terms of counselor person-hours. "Outputs" are the projected number of activities specified within the timeframe of each objective, such as counseling sessions, parent contacts, student orientation visits to higher division schools, or numbers of students tested or able to demonstrate a certain level of knowledge.

Projections of time and activity for each month during the year can be prepared from the planning form using the following sequence of steps:

1. Enter estimated time and output units for each objective with mandated date of performance. For example, if the district's standardized testing takes place every November, the time necessary to perform testing is entered in the "November" column. The estimated time needed to carry out follow-up activities required by the objectives (e.g., interpretation of test results to students, conferences with teachers on results, parent conferences in certain cases) is then entered in the appropriate succeeding months. For example, if test results come back in January, time for follow-up activities on testing should be allocated in January.

2. Enter estimated time and output units for routine guidance activities that have some timeframe from past years' experience. For example, counseling students with academic or social problems has always been a major guidance activity. Counselor logs of other years as well as the counselors' own frame of reference will provide the base for estimating how many routine contacts (and approximate time consumed) may be expected for each month or period.

3. Develop and enter estimated time and output units for objectives that require a large number of contacts over an extended period of time. For example, if an objective specifies that the high school counselors meet with each student once during his junior year to discuss career planning, the counselor should plan to see a certain number of the total group of juniors each month to prevent being overburdened at the end of the school year. Monthly assignments of contacts for these objectives should consider workload peaks already entered under the preceding two steps and assign a greater number of contacts in those months with lower workloads.

4. Enter estimated time and output units for objectives not categorized under the first three steps above.

After the principal and counselors have completed the Program Activity Planning Form, they fill out the "Planned" columns of the Program Milestone

Report (Figure 18), summarizing the hours and output estimated for each objective from the planning form. The budget columns for "planned - this year" can be completed from the school's guidance Program Budget; however, it should be noted that the Program Budget will be projected for each of the seven major guidance program areas (e.g., records maintenance, pupil appraisal services, placement services) and not for each objective. (Note: The "previous year" columns for program outputs and program budgets can only be completed after the first year of operation of the guidance management system.)

Copies of the Program Activity Planning Form and the Program Milestone Report are maintained at each school as well as forwarded to the coordinator for use in the monitoring and evaluation process. At this point, the optional personnel performance management-by-objectives segment of the information and reporting system can also begin, with each counselor and his principal together planning the counselor's personal performance objectives for the year. These personal objectives would be supportive of the school's guidance objectives and reflect the special counseling abilities (if any) of the counselor (e.g., because of his or her background and experience, one counselor may choose to focus on objectives relating to children with special needs).

These personal performance objectives are recorded early in the year - after the school guidance objectives have been chosen - on the Professional Development and Planning Record (Figure 25). This form is discussed later as part of the year-end evaluation phase.

PHASE III: PROGRAM OPERATION AND MONITORING

The initial step in the operation and monitoring process is the reporting by individual counselors of their work hours-consumed, in terms of the objectives of the goal structure. Counselors traditionally maintain logs of their activities, which usually contain names, dates, and the purpose of contacts and counseling sessions. The district should adopt a standardized format for these logs so that data necessary for monitoring achievement of program objectives can be gathered from uniform sources. The counselors could then easily summarize a record of their weekly activities.

The Guidance Activity Report (Figure 19) is designed as a weekly summary of each counselor's guidance activities. Therefore, the budget columns on the milestone report will only show "planned," "actual," and "difference" figures summarized for the various program areas, while the program output columns indicate time and activity outputs by each objective. It shows the hours spent on each objective and the total number of activity outputs (contacts, sessions, number of students tested, etc.) accomplished during that week. The latter are then identified by the type of contact (with students, teachers, parents, or others) and, in the case of students, by the type of referral. The guidance chairman at each school receives the Guidance Activity Report from the counselors at that school, summarizes monthly the work of all counselors (utilizing the same form) onto another copy, and sends the monthly summary to the principal. The principal reviews it and forwards the report to the guidance program coordinator.

Meanwhile, the guidance program coordinator has prepared the basic planning data on the delivery of guidance services according to the objectives stated for each division. The coordinator summarizes these data first for each school, using the "planned" program outputs from the school's Program Milestone Report, and then for the three divisions. These "planned" activities are recorded on the Program Activity Summary (Figure 20).

When the principal forwards the monthly summary of guidance activities (the Guidance Activity Report) to the coordinator, the activities accomplished that month by each school are recorded on the Program Activity Summary. This summary thus becomes the primary control device for activities within the guidance management system, since the report summarizes for each school and the three divisions counseling contracts by period and year to date as well as planned versus actual activity outputs. The coordinator can quickly see which divisions and which schools are falling behind in achieving their objectives.

The Program Cost Summary (Figure 21) performs a similar function. The coordinator receives periodic direct and indirect cost data on the guidance program budgets from the budget office and completes the cost summary which shows expenditures by program by division. With proper coding, these cost data can be broken down by individual school as well. The individual school cost summary is sent by the coordinator to the principals, who review their monthly and year-to-date guidance expenditures as part of their monitoring of the school's guidance program.

The monthly Program Activity Summary and the Program Cost Summary should enable the coordinator to identify any problem areas developing in the level of activity and the guidance expenditures. If the coordinator notices that the activity for a particular objective or series of objectives is considerably below the planned level or that the expenditures for a certain program are much higher than they should be, the coordinator can follow up with the principals, counselors, or the divisional task forces and discuss the problem.

In cases where possible change in the goals and objectives structure is indicated, the coordinator can cycle a Program Change Proposal (Figure 22) to the appropriate divisional task force, which has responsibility for modifying goals and objectives. In addition to internal difficulties pinpointed through monitoring which require changes in the program structure, communications with the user group and participants in the guidance system may reveal new guidance needs during the year. If the need is major and immediate (e.g., a sudden increase in the students' use of drugs), the coordinator sends a Program Change Proposal to the appropriate task force which may modify the program structure as necessary to address the new need.

PHASE IV: EVALUATION

At year-end, the evaluation reporting process begins with the principals completing the Program Milestone Report for their schools. The cumulative activity output for each objective is taken from the Program Activity Summary forwarded by the coordinator and from the monthly Guidance Activity Reports for each school. The budget data for the program level come from the business office.

The completed year-end Program Milestone Report is the primary means by which the principal and counselors at each school objectively review guidance activities and expenditures for that year. In addition, the principal and counselors discuss and subjectively appraise the degree to which they achieved their objectives, cite problems encountered in working toward the planned level of activity, and suggest remedial action or changes in objectives for the next year. These comments are recorded on the Program Milestone Report and sent from each school to the coordinator, who reviews them. (This annual subjective appraisal of the achievements of the guidance program is an integral companion review to the quantitative evaluation of fiscal and programmatic data on objectives.)

In addition to completing their milestone reports, principals will be evaluating the annual performance of individual counselors. In districts which have adopted the optional management-by-objectives segment related to the counselor's achievement of personal performance objectives specified early in the year on the Professional Development and Planning Record (Figure 25). This form allows both counselor and principal to comment on the counselor's strengths and weaknesses, successes and misses, and counseling abilities. It also provides a measure of the counselor's contribution to the success of the school's guidance program in meeting its overall objectives. The Professional Development and Planning Record becomes part of the counselor's permanent employment file.

When the program coordinator receives the Program Milestone Report from the principals, he or she summarizes year-end data for the Program Cost Summary at each school and the district and prepares the Program Activity Summary for the district.

In preparing the activity summary, which goes to the task forces, the superintendent and other administrators, and the Board, the coordinator will also make narrative comments on the achievement of objectives, difficulties, and recommendations for change.

The guidance program coordinator completes two other forms as part of the annual evaluation: the Participant/Beneficiary Contact Summary (Figure 23) and the Program Evaluation Form (Figure 24). The contact summary indicates the number of guidance contacts made by type of beneficiary and program area. These data are taken from the monthly Guidance Activity Reports. The completed contact summary is then forwarded to the user group along with a copy of the needs survey summary (Figure 14), so that the group (and the community members to whom they disseminate guidance information) can see how the guidance program has addressed the community's guidance needs over the year.

VI - AREAS OF CONCERN IN IMPLEMENTING THE GUIDANCE MANAGEMENT SYSTEM

Based on PMM&Co.'s experience in developing and implementing the guidance management system in the pilot district, some important issues have surfaced that should be considered by any district undertaking such a system.

FACT-FINDING

Those attempting to implement a guidance management system should first do a thorough fact-finding study in their district. In short, "know your district and your guidance program." The two main purposes of the study are:(1) document what is currently happening in the district's guidance program and (2) identify constraints to developing a system such as attitude, experience, or existing legal and financial agreements.

Existing Guidance Services and Organization

During the fact-finding study, input from counselors, students, and teachers is essential before implementation. Their perceptions of the existing guidance program and its strengths and weaknesses point up some of the basic needs and desires of those most directly involved with guidance services.

More important, the study must analyze the organization of both guidance services and the district. Districts vary in the roles and responsibilities of counselor chairmen (some districts may have none), Director of Pupil Personnel Services, and other positions relevant to guidance services. The decision points and action steps in the model, as presented in Sections IV and V, might have to be modified to reflect different levels of responsibility for a particular district's guidance personnel. Administrators doing the fact-finding study should also assess where the major decisions are made in their district--not only in terms of formal organizational authority but in terms of the political, realities and competence level within the district's organization structure. For example, persons implementing the system should know whether the power and authority in a district guidance program is really wielded by the principals or by the director of Pupil Personnel Services or by some other administrator; when designing the new guidance system.

It is equally important to know what services are now being provided by the district guidance program and what are their procedures. For example, consideration should be given to the following questions.

- Do the counselors fill out daily logs of their sessions and contacts?
- If the elementary counselors are itinerant, to whom do they report?
- Does high school guidance focus primarily on getting students into college, helping them to find jobs after graduation, or dealing with daily "problem student" crisis?
- What is the procedure for teachers referring students to counselors: is it simple, or so difficult and time-consuming that referrals are discouraged?

Constraint Analysis

The second major purpose of the fact-finding is to identify any constraints that may hinder implementation. A district considering a guidance management system must be aware of any legal constraints inherent in the teacher/counselor union bargaining agreement. For example, constraints may be revealed by asking the following questions.

- Are teachers or counselors forbidden under their contract, to do certain types of paperwork (keep student records, maintain referral logs) that impact the scope of objectives developed under the system?
- Can counselors receive compensatory time if they add evening and early morning counseling sessions to expand their services to students and parents?

In addition to the legal contractual constraints, the whole question of the union's general attitude toward a guidance management system is important to the success of any such system. The potential implementers should be aware that strong resistance by the union could mean failure of the project. In particular, the spectre of "accountability" which is sometimes raised in connection with an educational management system such as the PMM&Co. model should be handled carefully. The guidance management system does hold the principels and counselors and guidance administrators accountable for accomplishing their objectives within their budgets. Ultimately, the community (which comprises the users of the district's guidance services) holds these faculty and administrators accountable for meeting the guidance needs of the students.

However, the guidance management system as designed by PMM&Co. does not impose accountability on any individual counselor. (The optional counselor personal evaluation system can be implemented in a district which does not have union or other constraints and which chooses to establish a system of individual counselor accountability).

In any case, a district implementing the guidance management system will probably have to deal with implicit or explicit fears of accountability. In the pilot district, this situation was somewhat alleviated by including teachers' union representatives from the beginning in the fact-finding and development stages.

Equally important is ongoing communication about the management system which keeps everyone--teachers, counselors, principals, and others--informed during the initial phases, whether or not he or she is directly involved. All participants in the system will of course receive a complete explanation of what is expected of them once the system is implemented (see Phase III: Program Operation and Monitoring).

The fact-finding should also reveal if there are other serious attitudinal problems to be overcome, such as school board opposition. Before implementation can begin, those implementing the system should work to dispel resistance and general fear of change. A good technique for dealing with individuals and groups who express opposition or fear is to be sure that they are actively involved in the implementation. Keeping everyone informed of progress on the guidance management system is equally important.

OBJECTIVE CONCEPT

The experience level of task force participants with basic management concepts will be a factor in the ease and speed with which the system is implemented. If counselors and principals especially are familiar with development of behavioral objectives (as many are) and are acquainted with concepts such as budgeting, needs assessment, long-range planning, and resource allocation, the implementation process will go more smoothly.

A particularly difficult concept for some divisional task forces to grasp is the development of program objectives. There seems to be a tendency in developing objectives to restate activities already included in their job descriptions. Therefore, instead of the objectives representing activities that should be taking place in the guidance program, they merely reflect what is currently being done.

When a task force begins objective development, the members may want to review their job descriptions as a starting point. The focus of objectives, however, should be to move beyond current duties and responsibilities to the expanded activities required to address the new goals of the guidance program. For example, objectives for the pupil appraisal program should go beyond restating the steps necessary to complete the district's annual testing schedule; they should strive instead to increase the present level of counselor effort in giving a better interpretation of the test results, or in devising ways to help teachers use the results to improve their teaching, or in disseminating results to parents so that they can better understand their child's learning process.

Part of the difficulty with objectives developed directly from job descriptions is that, in reality, they are often statements of activities that must take place. Objectives should be desired accomplishments which usually involve several activities. An objective which states in isolation that student test results will be mailed to all parents by a certain date is merely an activity statement, unless that date or mailing represents a step forward that would make the activity a real accomplishment in terms of the current guidance program.

BUDGETING

The area of program budgeting may present some problems to a district attempting the guidance management system. PMM&Co. found that the pilot district had no past program budgets on which to base projected three-year costs for their new program-based guidance program. In previous years, the fiscal office had budgeted one lump sum for all guidance services at all levels. It was necessary therefore to use the roughest estimates (described in Phase II, Program Development and Budgeting) to arrive at a guidance budget for each school's guidance program.

The budgeting format shown in Figure 9 also may present difficulties. Although it is a simple, standard program budgeting format, districts which are not doing program budgeting do not collect cost data on supplies and capital outlay or revenue sources by program area. These figures would have to be "guesstimated" for the first year and then collected manually each year by the guidance program unless the district had a fairly sophisticated computerized accounting system.

The problem of accounting in two ways--programmatically for the guidance program and by line item for all other areas--will be a concern in many districts.

COMMITMENT

The single greatest factor in successful implementation of the guidance management system has proven to be the commitment and time given the project by the district's administrators. It is essential that the management system have the superintendent's support; if possible, he should address the various groups at the beginning of implementation--the district and divisional task forces and and the user group--to make his support obvious.

Building Principals

Active involvement of the principals as task force members also indicates the district's commitment to a more effective guidance program. Since the principals have the day-to-day responsibility and authority for overseeing the guidance program in their schools, they have a great deal of influence in helping the guidance management system to operate smoothly.

Much of the system's monitoring and evaluation involves the principals, especially in reviewing and reporting counselor activities. In order to make these additional time-consuming tasks worthwhile, principals (and counselors as well) must be committed to the belief that the system they have implemented will ultimately provide better guidance services to students. The principals, who represent middle management in a district, are key in the daily operation of the guidance management system, particularly at the beginning of the implementation process.

Guidance Program Coordinator

A third element of the commitment factor is the necessity for a full-time guidance program coordinator. The district undertaking the guidance management system should commit a guidance professional to the job of coordinating the implementation process, providing support to principals and counselors throughout program operations, and overseeing the monitoring and evaluation of the data collected from the entire guidance management system. The time involved in these tasks requires a full-time person for the first few years, especially if the district does not have a sophisticated computerized data collection method.

A lot of the time and effort expended by the district in its goal and objective development and program analysis process might be lost without a dedicated program coordinator to ensure the smooth operation of the overall guidance management system at all levels. In addition, while each school will have its own budget and programmatic data for evaluation, the type of district-wide guidance program information necessary for the superintendent and other administrators to evaluate and make decisions must be collected and synthesized throughout the year by the coordinator. If a district wants its guidance management system to operate successfully, it should be willing to commit the funds, facilities, and support for a professional to oversee and maintain the system.

APPENDIX A

Figures 7, 9, and 14 Through 25

Reporting Forms and Instructions

FIGURE 7: GUIDANCE/COUNSELING SERVICES

COMMUNITY NEEDS SURVEY (BY MAIL)

DATE:

DEAR COMMUNITY MEMBER:

Your school district would like to know what you think what students and the community needs most from the elementary/secondary school guidance program. This survey will allow you to indicate which guidance activities are most important in your opinion. The survey is anonymous; the results will be tabulated and made public later. Please return the completed form within one week of your receiving it.

① TYPE OF RESPONDENT: Check the group or groups best describing your relationship to the school district.

___1. Teacher
___2. Guidance Counselor
___3. School Administrator
___4. Parent of Student in District Schools
___5. Student
___6. Post Graduate of Bristol Township School District
___7. Local Labor/Industry Employer
___8. Local Higher Education Admissions Officer
___9. Other School District Staff
___10. Community Resident
___11. State Employment Agency Worker
___12. Community Service Worker
___13. Other (please describe) ____________________

② Below is a list of nine activities that form the foundation of a comprehensive guidance program. We would like your opinion of their relative importance to the overall guidance program. Please rank them in order of importance by placing a number one (1) next to the activity you consider most important and then continuing through to the least important activity which would be ranked nine (9).

___ Establish and maintain relevant student records.
___ Counsel students in academic, career, and personal/social areas.
___ Counsel parents on their student's problems.
___ Work with other professional school staff members, such as teachers, to solve student problems.
___ Provide general career information to students.
___ Provide general educational information to students.
___ Provide general personal/social information to students.
___ Administer the district's standard test program and other tests to help students define his academic, personal, and career goals.
___ Assist students in getting jobs while in school and after graduation or in being admitted to the postsecondary school of their choice.
___ ____________________
___ ____________________
___ ____________________

* * * * *

FOR USE BY LOCAL EMPLOYERS, ADMISSIONS
OFFICERS, AND PLACEMENT OFFICERS

③ If you have interviewed school district students or graduates for employment or postsecondary education admissions, please comment on any guidance-related strengths or problems you have noticed overall (for example, in their ability to conduct interviews and fill out forms appropriately, or in work or study attitudes and habits, or in adjustment to new work or study situations).

____
____
____
____
____
____

PROCEDURAL INSTRUCTIONS FOR GUIDANCE/COUNSELING SERVICES COMMUNITY NEEDS MAIL SURVEY

PURPOSE OF FORM:	To collect information from users of guidance services as to their perceptions and ranking of the most important guidance activities.
RESPONSIBILITY FOR COMPLETING FORM:	Guidance coordinator provides representatives of user groups with survey instrument, this group then distributes survey guide to the constituencies which they represent to elicit responses.

PROCEDURAL INSTRUCTIONS:

Field	Description
(1)	List of type of respondent is prepared by guidance coordinator based on the major groupings in his/her community (A typical list is shown). Responses to the survey may indicate additional types under "Other" who were left out; these types can be added to the list in future years.
(2)	List of guidance activities shown on sample form is prepared from those activities grouped under the guidance areas in United States Office of Education Handbook IV. These activities also correlate to the guidance activities and program areas in the Guidance/Counseling Services Needs Survey Summary and the year-end Participant/Beneficiary Contact Summary. In addition to the nine activities shown, the coordinator should add any other major guidance activities unique to his community.
(3)	Question in sample form is directed to local employers, admissions officers, and placement officers. Coordinator, in preparing mail survey, may add other questions relevant to that particular community.

FIGURE 9: PROGRAM BUDGET

School ① ____________________

Program Name ② ____________________

Resource Requirements ③	④ Current Year ⑤		⑥ Budget Fiscal Year		
	Actual	Budget	1	2	3
1. Salaries					
2. Emp. Benefits					
3. Purc. Services					
4. Supplies					
5. Capital Outlay					
6. Other					
7. Total Projected Direct Costs ⑦					
Revenue Sources ⑧					
8. Federal					
9. State					
10. Local					
11. Other					
12. Total Revenue ⑨					

Recommended by: ⑩ ____________________

____

Date ⑪ ____________________

____

Board Adoption ⑫ ____________________
(Date)

PROCEDURAL INSTRUCTIONS FOR PROGRAM BUDGET FORM

PURPOSE OF FORM:

To develop at beginning of school year projected costs and revenues for current year and at least three years into the future; and to prepare these costs and revenues by program category and building level.

RESPONSIBILITY FOR COMPLETING FORM:

The principal and counselors prepare the program budgets for their respective schools and submit them to the guidance coordinator, who summarizes them according to the three educational levels. He then submits the elementary, middle and high school budgets for approval of district's central administration and board.

PROCEDURAL INSTRUCTIONS

Field	Description
(1)	Enter name of school building for which budget is being prepared.
(2)	Enter name of program service category (e.g., counseling, pupil appraisal, information, placement or records maintenance).
(3)	Determine cost requirements for each cost category which should be based upon projected expenditure for all activities associated with program category.
(4)	Enter direct costs for each cost category for the current year, after board adoption of program budget.
(5)	Enter projected direct costs for each cost category which will be submitted for approval.
(6)	Enter planned direct costs for each cost category for three future years.
(7)	Calculate total projected and actual direct costs for current and future years.

PROCEDURAL INSTRUCTIONS (continued)

Field	Description
(8)	List actual and anticipated revenues which include federal and state grants and local district budgeting funds based on prior years funding of program.
(9)	Calculate total revenues for actual and planned columns for current year and three future years.
(10) and (11)	Enter name of building principal and date, when schools guidance program budget is completed. Guidance coordinator performs same function when he completes budget for each educational level. Same procedure is followed by central administration (e.g., superintendent).
(12)	Enter date in which educational level budgets are approved.

PROCEDURAL INSTRUCTIONS
FOR
GUIDANCE/COUNSELING NEEDS SURVEY SUMMARY

PURPOSE OF FORM: To provide the district task forces with an information base to develop and assess guidance program goals by indicating what users of guidance services rank as the priority guidance program activities.

RESPONSIBILITY FOR COMPLETING FORM: Guidance coordinator completes this form after tabulating and summarizing from Community Needs Mail Survey each respondent's ranking of guidance program activities.

PROCEDURAL INSTRUCTIONS:

Field	Description
(1)	Month/day/year in which form is prepared.
(2)	Enter listing of same guidance program activities which are contained on the Community Needs Mail Survey instrument (sample listing shown).
(3)	Enter additional activities if such are indicated by respondents on Community Needs Mail Survey.
(4)	Enter listing of type of respondents from whom Mail Survey was received.
(5)	Enter any additional respondents, if identified, to whom mail survey was distributed.
(6)	Enter ranking score for each activity (1 through 9) based on total rankings tabulated for all respondents in each classification (e.g., teacher respondents as a whole ranked the activity "to establish and maintain relevant student records" as 7th in their priorities).

PROCEDURAL INSTRUCTIONS (continued):

Field	Description
(7)	Enter composite ranking score activities for overall community tabulated from the ranking of all respondents.
(8)	Enter both total number of all respondents and total number of respondents per each classification.

FIGURE 15: PROGRAM DEVELOPMENT WORKSHEET

Page of

PERIOD COVERED 9/75 to 9/76 ①
DATE PREPARED _/_/_ ②
EDUCATIONAL LEVEL:
ELEMENTARY
MIDDLE ③
HIGH
PREPARED BY __________ ④

LEVEL I - GUIDANCE GOAL STATEMENT
⑤

LEVEL II - GOAL STATEMENT
(GUIDANCE FOCUS: ACADEMIC, CAREER, PERSONAL/SOCIAL)
⑥

LEVEL III - SUB-GOAL STATEMENT
(BY EDUCATIONAL LEVEL)
⑦

LEVEL IV SUB-GOAL STATEMENT (SUPORTIVE OF LEVEL III)	LEVEL V OBJECTIVE STATEMENT	OBJ. NO.	TYPE OF ACTIVITY OUTPUT	SOURCE OF DATA	PROGRAM CATEGORY	ALTERNATIVE ACTIVITIES (IF ANY)
⑧	⑨	⑩	⑪	⑫	⑬	⑭

PROCEDURAL INSTRUCTIONS FOR PROGRAM DEVELOPMENT WORKSHEET

PURPOSE OF FORM: To illustrate the agreed upon structural relationship among goals, objectives, programs, activities and outputs for each (elementary, middle school and high school) divisional task force. Input in preparing this form is based on the analysis of needs survey summary data; update of goals and objectives results from annual program evaluation.

RESPONSIBILITY FOR COMPLETING FORM: Responsibility for completion of this form is assumed by each (elementary, middle school and high school) divisional task force.

PROCEDURAL INSTRUCTIONS:

Field	Description
(1)	Month/Year at start and end of coverage period.
(2)	Month/Day/Year on which form is completed.
(3)	Check (✓) appropriate educational level.
(4)	Name of person completing form (Chairman of Divisional Task Force).
(5)	Enter guidance goal statement developed by district wide task force.
(6)	Enter academic, career and personal/social goal statements developed jointly by divisional task forces.
(7), (8) and (9)	Enter sub-goal statement(s) and supportive objectives developed by each divisional task force.

PROCEDURAL INSTRUCTIONS (continued):

Field	**Description**
(10)	After completion of (9), objectives for each divisional level should be numbered. A suggested numbering format follows: . Assign numbers 100 to 399 to elementary level; assign numbers 400 to 699 to middle level; assign numbers 700 to 999 to senior level . Numbers should be assigned consecutively to objectives supporting a common Level IV sub-goal statement . Leave at least five numbers unassigned between groups of objectives relating to different Level IV goals to allow for mid-year change
(11)	Enter type of activity description for each objective. For example, an objective to counsel all ninth grade students by the end of ninth grade would have the number of ninth grade students entered in column 11.
(12)	Enter source of input data (counselor log, referral slip count, etc.) which will be used to collect activity data.
(13)	Enter program category and/or brief program description to which each objective has been assigned by Divisional Task Force (e.g., career counseling for students). Program names/descriptions are defined in Handbook IV, U.S. Office of Education or contained in the finalized program structure.
(14)	Enter any alternative activities that may be necessary to augment existing activities but not included in the program category.

FIGURE 17: PROGRAM ACTIVITY PLANNING FORM

SCHOOL ______①______ NO. ② YEAR ___/③ PREPARED BY ④______________ DATE PREPARED ___/⑤/___

PROGRAM CATEGORY	OBJ. NO.	TYPE OF ACTIVITY OUTPUT	PLANNED ACTIVITY DISTRIBUTION BY PERIOD																								TOTAL PLANNED PROGRAM ACTIVITY FOR YEAR		COMMENTS (INCLUDING SPECIAL RESOURCE NEEDS)
			SEPT		OCT		NOV		DEC		JAN		FEB		MARCH		APRIL		MAY		JUNE		JULY		AUG				
			1		2		3		4		5		6		7		8		9		10		11		12				
⑥	⑦	⑧	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	
			⑨	⑩																							⑪	⑫	⑬
TOTAL ACTIVITY DISTRIBUTION ⑭		☒																											

PROCEDURAL INSTRUCTIONS FOR GUIDANCE PROGRAM ACTIVITY PLANNING FORM

PURPOSE OF FORM:

To present planning at the beginning of the school year guidance program activities to be conducted at each school location during the school year. This form is also used to summarize all planned activities on a district-wide basis.

RESPONSIBILITY FOR COMPLETING FORM:

- Guidance Program Coordinator is responsible for summarizing district wide, planned activities
- Guidance Counselors, Guidance Counselor Chairman and School Principal are jointly responsible for completing this form at the beginning of the school year

PROCEDURAL INSTRUCTIONS:

Field	Description
(1)	School name
(2)	School number
(3)	School year(i.e., 1975/1976).
(4)	Name of person completing form.
(5)	Month/Day/Year on which form is completed.
(6)	List guidance services programs by category as contained in program structure and/or defined in Handbook IV, United States Office of Education (i.e., pupil appraisal, counseling with students, information services, records maintenance, etc.)*.
(7)	List all guidance program objectives by precoded number and classify by program category (field 6).

*Data for fields (6) and (7) to be developed by Divisional Task Force at each educational level and preprinted on forms prior to distribution for completion. Data are taken from Program Development Worksheet (Figure 15). Coordinator will be responsible for preparation and distribution of forms.

PROCEDURAL INSTRUCTIONS (continued):

Field	Description
(8)	Enter description of type of activity output for each objective (for example, number of students to be tested, number of parents to be contacted). Activity outputs for each division can be found on Program Development Worksheet.
(9)	Enter estimated activity output for each month. Output units are defined in objective statements (e.g., number of students receiving career counseling or being tested).
(10)	Enter estimated hours to be spent on each guidance program objective for each month/period .
(11) and (12)	Enter cumulative of estimated outputs and hours for each objective for entire year. There should be some correlation between fields 11 and 12 and the type of activity outputs shown in field 8.
(13)	Comments will identify particular resources which may be needed to accomplish objective and to specify potential constraints which might affect objective accomplishment.
(14)	Calculate total of columns (9), (10), (11) and (12).

FIGURE 18: PROGRAM MILESTONE REPORT

PERIOD COVERED ___/___/___ ① to ___/___/___
DATE PREPARED ___/___/ ②
PREPARED BY ③ ____________
④ ☐ DIVISION SUMMARY
☐ SCHOOL SUMMARY
SCHOOL NAME ⑤ ____________ NO. ⑥ ______

PROGRAM CATEGORY	OBJ. NO.	TYPE OF ACTIVITY OUTPUT	PROGRAM OUTPUTS												PROGRAM BUDGETS (DOLLARS)						COMMENTS OR ACTIONS REQUIRED/RECOMMENDED SUBJECTIVE APPRAISAL OF ACHIEVEMENT
			PREVIOUS YEAR						THIS YEAR						PREVIOUS YEAR			THIS YEAR			
			PLANNED		ACTUAL		DIFFERENCE		PLANNED		ACTUAL		DIFFERENCE		PLANNED	ACTUAL	DIFFERENCE	PLANNED	ACTUAL	DIFFERENCE	
			HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS	HRS.	OUT-PUTS							
⑦	⑧	⑨	⑩		⑪		⑫		⑬		⑭		⑮		⑯	⑰	⑱	⑲	⑳	㉑	㉒
TOTAL ㉓																					

PROCEDURAL INSTRUCTIONS FOR PROGRAM MILESTONE REPORT

PURPOSE OF FORM:

To monitor guidance programs to determine whether objectives are being accomplished in accordance with planned outputs, hours and program costs; and to identify problem areas by comparing actual to planned expenditures.

RESPONSIBILITY FOR COMPLETING FORM:

Counselors and Principals complete the planned columns of form summarizing the outputs and hours estimated for each objective on the Program Activity Planning Form (Figure 17).

Guidance Coordinator completes the actual columns of form summarizing outputs and hours. The latter summary data are taken from the monthly completion of the Program Activity Summary (Figure 20). Actual cost data are obtained from the Program Cost Summary (Figure 21).

PROCEDURAL INSTRUCTIONS

Field	Description
(1)	Enter dates for reporting period. Reporting period should be quarterly.
(2) and (3)	Enter month, day and year in which form is prepared, and name of individual responsible for preparing form (e.g., counselor, principal and guidance coordinator).
(4)	Check (✓) to indicate whether summary is division (elementary, middle or high levels) or school (building level).
(5) and (6)	When form is School Summary, indicate name and facility code number of school.
(7), (8) and (9)	Program categories, objective number and type of activity output should be inserted on this form after completion of Program Development Worksheet (Figure 15).

PROCEDURAL INSTRUCTIONS (continued)

Field	Description
(10)	Enter from Program Activity Planning Form (Figure 17) previous years planned outputs and hours.*
(11)	Enter from Annual Program Evaluation Summary (Figure 24) actual outputs and hours.*
(12)	Enter computed difference between planned vs. actual (10) and (11) outputs and hours.*
(13)	Enter from Program Activity Planning Form (Figure 17) planned outputs and hours.
(14)	Enter from monthly prepared Program Activity Summary (Figure 20) actual outputs and hours.
(15)	Enter computed difference between planned vs. actual (13) and (14) outputs and hours.
(16)	Enter planned or projected direct costs for each program as contained on Program Budget Form (Figure 9).
(17)	Enter from monthly prepared Program Cost Summary (Figure 21) total costs for each program category.*
(18)	Enter computed difference between planned vs. actual (16) and (17) program category costs.
(19)	Same as (16) but for current year of operations.
(20)	Same as (17) but for current year of operations.
(21)	Same as (18) but for current year of operations.

*Note: Previous year column will be completed after district guidance program's first year of operations.

PROCEDURAL INSTRUCTIONS (continued)

Field	Description
(22)	Principal or counselors should list constraints or circumstances which might influence the achievement of program objectives. Also, guidance coordinator should note recommendations or required actions regarding qualitative or quantitative changes in objectives and outputs/hours respectively.
(23)	Counselors and principals calculate totals for columns (10), (13), (16) and (19). Guidance coordinator calculates totals for columns (11), (12), (14), (15), (17), (18), (20) and (21).

FIGURE 19: GUIDANCE ACTIVITY REPORT

SCHOOL ① NO. ②
COUNSELOR ③
WEEK/PERIOD ENDING ④

PROGRAM CATEGORY	OBJECTIVE NUMBER	TYPE OF ACTIVITY OUTPUTS	ACTIVITY DISTRIBUTION		STUDENT COUNSELING SESSIONS								CONTACTS OTHER THAN STUDENTS ⑫									COMMENTS
			HOURS	OUT-PUTS	REFERRALS FROM ⑩				REFERRALS TO ⑪													
					STUDENT	TEACHERS	PRINCIPAL	OTHER	COUNSELOR	TEACHER	PRINCIPAL	OTHER	TEACHERS	COUNSELORS	ADMINISTRATORS	PARENTS	POST GRADUATES	LABOR/INDUSTRY	HIGHER EDUC.	OTHER P.P.S.	COMM. SERV. AG.	⑬
⑤	⑥	⑦	⑧	⑨																		
OTAL ACTIVITIES DISTRIBUTION ⑭		☒																				

PROCEDURAL INSTRUCTIONS FOR GUIDANCE ACTIVITY REPORT

PURPOSE OF FORM: To collect and report information on weekly guidance counselor activities.

RESPONSIBILITY FOR COMPLETING FORM:

- Guidance Counselor (GC) completes weekly by transferring counseling activity information from daily log
- Guidance Counselor Chairman completes monthly same information as individual counselors by summarizing activities for all schools. Monthly summary is forwarded to principal who then forwards it to Guidance Coordinator

PROCEDURAL INSTRUCTIONS:

Field	Description
(1)	School name.
(2)	School number.
(3)	Name of person completing form.
(4)	Month/Day/Year on which reporting period ends.
(5)*	List guidance services programs by category as contained in program structure and/or defined in Handbook IV, United States Office of Education (e.g., pupil appraisal, counseling with students, information services, record maintenance, etc.).
(6)*	List guidance program objectives by precoded number and classify by program category.
(7)	Enter type of activity output for each objective (taken from Figure 15).

*Note: Data for (5) and (6) to be developed by Divisional task force at each educational level and pre-printed on forms prior to distribution for completion.

PROCEDURAL INSTRUCTIONS (continued):

Field	**Description**
(8)	Enter actual hours spent on each guidance program objective for reporting week or period.
(9)	Enter actual activity output performed for each guidance program objective for reporting week or period. Output units are defined in objective statements (e.g., number of students receiving career counseling or being tested).
(10)	Indicate number of student referrals received by counselor according to referral source. Number of referrals should be listed per each objective and source.
(11)	Indicate number of student referrals made by counselors to each type of referral category (e.g., principal, teacher).

FIGURE 20: PROGRAM ACTIVITY SUMMARY

DIVISION: ① ☐ ELEMENTARY ☐ MIDDLE ☐ HIGH

☐ DIVISION SUMMARY ② ☐ SCHOOL SUMMARY
SCHOOL NAME ________ NO.___

FOR PERIOD ③ YEAR TO DATE
DATE PREPARED ___/④___
PAGE 1 of 2

PROGRAM CATEGORY ⑤	OBJECTIVE NUMBER ⑥	REFERRALS OR REQUESTS FOR STUDENT COUNSELING FOR PERIOD ⑦								COUNSELING CONTACT ACTIVITY (OTHER THAN STUDENT) - PERIOD										COUNSELING CONTACT ACTIVITY (OTHER THAN STUDENT)- YEAR TO DATE									
		FROM				TO				ACTUAL ⑧										ACTUAL ⑨									
		STUDENT	TEACHERS	PRINCIPAL	OTHER	COUNSELOR	TEACHERS	PRINCIPAL	OTHER	TEACHERS	COUNSELORS	ADMINISTRATORS	PARENTS	STUDENTS	POST GRADUATES	LABOR/INDUSTRY	HIGHER EDUC.	OTHER P.P.S.	OTHER COMMUNITY SERVICE AGENCIES	TEACHERS	COUNSELORS	ADMINISTRATORS	PARENTS	STUDENTS	POST GRADUATES	LABOR/INDUSTRY	HIGHER EDUC.	OTHER P.P.S.	OTHER COMMUNITY SERVICE AGENCIES
TOTAL ⑩	☒																												

PROGRAM ACTIVITY SUMMARY

DIVISION: ⑪ ☐ ELEMENTARY ☐ MIDDLE ☐ HIGH

☐ DIVISION SUMMARY ⑫ ☐ SCHOOL SUMMARY
SCHOOL NAME ________ NO.___

FOR PERIOD _____ YEAR TO DATE
DATE PREPARED ___/___/⑬
PAGE 2 of 2

PROGRAM CATEGORY ⑭	OBJECTIVE NUMBER ⑮	TOTAL OUTPUT ACTIVITY (IN UNITS)															VARIANCE FROM PLANNED OUTPUT ACTIVITY ⑳ (PER CENT)		ACTIVITY HOURS ㉑ (PER CENT)		- COMMENTS - ㉒ (SUBJECTIVE APPRAISAL OF ACHIEVEMENT)
		TYPE OF ACTIVITY OUTPUT	PLANNED FOR COMPLETION THIS PERIOD	COMPLETED THIS PERIOD	PLANNED FOR COMPLETION IN PERIOD: ⑲																
					SEPT 1	OCT 2	NOV 3	DEC 4	JAN 5	FEB 6	MAR 7	APRIL 8	MAY 9	JUNE 10	JULY 11	AUG 12	PERIOD	YEAR TO DATE	PERIOD	YEAR TO DATE	
		⑯	⑰	⑱																	
TOTAL	☒																				

PROCEDURAL INSTRUCTIONS
FOR
GUIDANCE PROGRAM ACTIVITY SUMMARY

PURPOSE OF FORM:	To monitor monthly accomplishment of objectives by school and educational division through the comparison of planned vs actual guidance activities and outputs .
RESPONSIBILITY FOR COMPLETING FORM:	Guidance Coordinator, using composite Monthly Summary of Activities (Form 19).

PROCEDURAL INSTRUCTIONS

Field	Description
(1)	Check (✓) box corresponding to educational level report represents.
(2)	Check (✓) appropriate box to indicate division summary or individual school report: if individual school report, enter school name and number.
(3)	Enter period number corresponding to period completed immediately prior to completion of report. Reference field (17) for period numbers .
(4)	Month/Day/Year report is prepared.
(5),(6)	List guidance program objectives by precoded number and classify by program category.
(7)	Enter from principals' monthly summary of guidance activities total monthly student referrals by category of person referring student to counselor and by category of person to whom student is referred.
(8)	Enter from principals' monthly summary of guidance activities total monthly contacts with other than students, by objective and contact type.

PROCEDURAL INSTRUCTIONS (continued):

Field	Description
(9)	Enter cumulative total (year to date) of counseling contacts (with other than students) according to objective and contact type .
(10)	Calculate and enter total referrals (from and to) and total contacts with other than students for the period and year-to-date by type of contact .
(11), (12) & (13)	Complete same as fields (1), (2) and (3) above.
(14), (15)	Complete same as fields (5) and (6), above .
(16)	Enter activity output per objective as noted on Form 19 .
(17)	Enter from Form 17, the number of activity outputs planned for the month per program category.
(18)	Enter from Form 19 (Principals' monthly guidance activity summary) by monthly total of activity outputs.
(19)	Enter from Form 17 planned activity outputs for each month.
(20)	Enter percentage of planned versus actual activity outputs for the current period and year to date.
(21)	Enter percentage of planned vs actual hours spent on activities for current period and year to date.
(22)	List comments if there are special circumstances which may have affected (negatively or positively) work accomplishment.

FIGURE 21: PROGRAM COST SUMMARY

FOR PERIOD ① AND YEAR TO DATE

DATE PREPARED ②

PREPARED BY ③

DIVISION SUMMARY

④ ELEMENTARY
MIDDLE
HIGH

SCHOOL SUMMARY ⑤

SCHOOL NAME ⑥ NO. ⑦

PROGRAM CATEGORY	SCHOOL NUMBER	DIRECT LABOR COSTS ⑩		OTHER COSTS ⑪		TOTAL COSTS ⑫	
		MONTH	YEAR TO DATE	MONTH	YEAR TO DATE	MONTH	YEAR TO DATE
⑧	⑨						
TOTAL ⑬							

PROCEDURAL INSTRUCTIONS FOR PROGRAM COST SUMMARY FORM

PURPOSE OF FORM: To monitor direct and program expenditures during course of school year, and report same information to building principals to update them on current expenditures of their guidance programs.

RESPONSIBILITY FOR COMPLETING FORM: Guidance coordinator collects program expenditure data from district's business office. and completes expenditure summary by building and division level. Also, he submits this information to individual building principals.

PROCEDURAL INSTRUCTIONS

Field	Description
(1)	Enter month and year in which form is prepared.
(2)	Enter month, date and year in which form is prepared by guidance coordinator.
(3)	Enter name of guidance coordinator.
(4)	Check (✓) appropriate division level for which form is prepared.
(5), (6) and (7)	Check (✓) when form applies to building summary, and enter school name and facility code number. Facility code is listed in district wide budget.
(8)	List each program category as defined on Program Development Worksheet (Figure 15). These categories should be pre-printed on this form once they are developed.
(9)	Enter building/facility code, when form is used to prepare educational/divisional levels.
(10)	Enter total of actual direct costs which is the sum of counselor salaries, and benefits of each program category for the month. Also enter under "year to date" column accumulative total of subsequent months.

PROCEDURAL INSTRUCTIONS (continued)

Field	Description
(11)	Enter monthly and year to date for each program category costs for supplies, purchased services, capital outlay and other.
(12)	Calculate total direct and other costs for each program category according to month and year to date.
(13)	Calculate totals for direct labor, other and total costs' columns.

FIGURE 22: PROGRAM CHANGE PROPOSAL

①PROGRAM TITLE ______________________ ②DATE __________

③OBJECTIVE NO. ________ ④BUDGET YEAR ______ ⑤PROPOSED BY ____________

⑥LEVEL AFFECTED BY CHANGE ☐ Elementary ☐ Middle ☐ High School

⑦Problem Identified or New Need:

⑧New or Modified Goal or Objective:

What benefits the change will provide the students (or service recipient), rather than how it will be accomplished.

⑨Advantages of Change:

Alternative Ways to Accomplish the Change (in Priority Order):

⑩ DESCRIPTION OF ALTERNATIVES	ESTIMATED TOTAL COST* ⑪		
	First Year ( )	Second Year ( )	Third Year ( )
A.			
B.			
C.			

⑫ Action Taked

* Use current costs and salary rates for all projections.

PROCEDURAL INSTRUCTIONS FOR PROGRAM CHANGE PROPOSAL FORM

PURPOSE OF FORM: To communicate to users and participants changes in the guidance program structure and/or goals and objectives so as to reveal new needs of guidance beneficiaries.

RESPONSIBILITY FOR COMPLETING FORM: To be completed by coordinator before being submitted to appropriate task force for consideration. After action is taken by task force, coordinator should complete item 12 and send copies of change notice to all task force chairpersons.

PROCEDURAL INSTRUCTIONS

Field	Description
(1)	Title of program category taken from Program Development Worksheet.
(2)	Date that change proposal is prepared.
(3)	Code number of objective to be changed; taken from Program Development Worksheet.
(4)	Current budget year (e.g., FY 1975-76).
(5)	Name of person (usually the coordinator) preparing the change proposal.
(6)	Level (elementary, middle, or high school) of task force which is responsible for objective to be changed and to which proposal is directed. This is determined by the educational level of the objective (can be taken from the Program Development Worksheet).
(7)	Coordinator's description of problem requiring change which has been identified through the Program Cost Summary, or an immediate major new need (e.g., a sudden increase in the students' use of drugs) which was not previously addressed by objectives.

PROCEDURAL INSTRUCTIONS (continued)

Field	Description
(8)	The actual new objective statement (or, in extreme cases, the new goal statement as well) proposed by the coordinator to address the problem or new need. This might also be a modification of a current objective to increase the coverage or intensity of services.
(9)	A brief description of the anticipated benefits or advantages the modified or new objective statement will bring about over the current program year. For example, a special series of group counseling sessions on drugs given for all students may help those who are using drugs as well as steer potential users away.
(10)	Similar to the "Alternative Activities" column of the Program Development Worksheet. This list outlines several (up to three) alternative ways of carrying out the indicated changes.
(11)	The estimated total cost of each of the alternative activities for carrying out the objective, projected for the current and two successive school years. This total cost estimate for each year should include direct labor and "other" costs (such as audio-visual equipment or outside speakers). These figures should be projected using current costs for all three school years. The necessary direct labor costs can be obtained from the budget officer.
(12)	After the appropriate task force has reviewed and discussed the proposed change, the coordinator enters what action was taken: whether the new objective was adopted, rejected, or modified by the task force. In addition, the alternative(s) chosen should be specified.

FIGURE 23: YEAR-END PARTICIPANT/BENEFICIARY CONTACT SUMMARY

PERIOD COVERED ___/___/___ ① TO ___/___/___ DATE PREPARED ② ___/___/___

☐ DIVISION SUMMARY ③ PREPARED BY ④ ____________________

SCHOOL NAME ____________________ ⑤ NO.____

EDUCATIONAL LEVEL: ⑥ ☐ ELEMENTARY ☐ MIDDLE ☐ SECONDARY ☐ ALL LEVELS

PROGRAM CATEGORY	⑦ PARTICIPANTS/BENEFICIARIES									
	TEACHERS	COUNSELORS	ADMINISTRATORS	PARENTS	STUDENTS	POST GRADUATES	LABOR/INDUSTRY	HIGHER EDUCATION	OTHER PUPIL PERSONNEL SERVICES	
ADMINISTRATIVE SERVICES										
COUNSELING SERVICES										
• STUDENTS										
• PARENTS										
• OTHER STAFF										
PUPIL APPRAISAL SERVICES										
INFORMATION SERVICES										
• ACADEMIC										
• CAREER										
• PERSONAL/SOCIAL										
RECORDS MAINTENANCE SERVICES										
PLACEMENT SERVICES										
OTHER GUIDANCE SERVICES										
• ____________										
• ____________										
• ____________										
TOTAL ⑧										

PROCEDURAL INSTRUCTIONS FOR YEAR-END PARTICIPANT/BENEFICIARY CONTACT SUMMARY

PURPOSE OF FORM:	To be completed at year-end by coordinator from monthly Guidance Activity Reports from each school. One form is to be prepared for each school's annual contact activity; one form for each educational division (elementary, middle, and high school); and one form summarizing all divisions.
RESPONSIBILITY FOR COMPLETING FORM:	Guidance coordinator summarizes from monthly guidance activity reports (Figure 19) number of contacts made by counselors during school year. He then forwards this form, with copies of evaluation and needs survey forms, to various user groups.

PROCEDURAL INSTRUCTIONS:

Field	Description
(1)	The dates of the beginning and ending of the school year covered by the summary.
(2)	The date on which the form was prepared.
(3)	Whether this summary has been completed to summarize all contacts for one educational division. Field (6) indicates which division.
(4)	Name of person completing form.
(5)	Name and number of school for which form is completed (for individual school summary).
(6)	Educational level of school being summarized, or summary for all educational levels.
(7)	Program categories as shown on the Needs Survey Summary, reflecting community's assessment of priority guidance needs.
(8)	Total annual number of contacts for each type of participant or beneficiary by each program category (taken from the Guidance Activity Reports for each school). Also summarized for each educational division and all divisions.

FIGURE 24

ANNUAL PROGRAM EVALUATION SUMMARY

SCHOOL YEAR-END PERIOD ______________ ①

DATE PREPARED ___/___/___ ②

PREPARED BY ______________ ③

DIVISION LEVEL: ④
☐ ELEMENTARY
☐ MIDDLE
☐ HIGH

BUILDING SUMMARY ☐ ⑤

SCHOOL NAME ______________ ⑥

FACILITY CODE NO. __________ ⑦

	TOTAL PLANNED PROGRAM SERVICES				TOTAL ACTUAL PROGRAM SERVICES			
PROGRAM CATEGORY ⑧	OBJ. No.	OUTPUT	HOURS	COSTS	OBJ. No.	OUTPUT	HOURS	COSTS
	⑨	⑩	⑪	⑫		⑬	⑭	⑮
ADMINISTRATIVE SERVICES								
COUNSELING SERVICES o STUDENTS o PARENTS o OTHER STAFF								
PUPIL APPRAISAL SERVICES								
INFORMATION SERVICES o ACADEMIC o CAREER o PERSONAL/SOCIAL								
RECORDS MAINTENANCE SERVICES								
PLACEMENT SERVICES								
OTHER GUIDANCE SERVICES								

PROCEDURAL INSTRUCTIONS FOR ANNUAL PROGRAM EVALUATION SUMMARY FORM

PURPOSE OF FORM: To assess by educational and building levels at year end by comparing planned against actual outputs, hours and costs per each program category. This form is distributed to district task force groups, district administrators and user groups.

RESPONSIBILITY FOR COMPLETING FORM: Guidance Counselor responsible for aggregating data by educational level and counselor chairperson responsible for completing form at building level.

PROCEDURAL INSTRUCTIONS

Field	Description
(1)	Enter date for end of the school year.
(2)	Enter month, date and year in which form is prepared .
(3)	Enter name of counselor chairperson at building level and guidance co-ordinator, when form is used to aggregate building level data according to educational level .
(4)	Check (✓) appropriate box that represents division level.
(5)	Check (✓) box to indicate building summary. This is done by counselor chairperson.
(6)	Enter name of school. This is done by counselor chairperson.
(7)	Enter budget code number to indicate building facility. The code number can be obtained from Business Manager's chart of accounts or annual budget and is affixed by counselor chairperson.
(8) and (9)	Enter each category of program structure and precoded objectives from Program Development Worksheet (Figure 15). This should be pretyped on this summary sheet after completion of Figure 15.

PROCEDURAL INSTRUCTIONS (continued)

Field	Description
(10) and (11)	Enter from Program Milestone Report (Figure 18) planned outputs and hours per each objective within program categories as they were finalized at the beginning of school year.
(12)	Enter total projected direct costs for resource requirements for each program category. This data is transferred from the Program Budget Form (Figure 9).
(13), (14) and (15)	Enter from Program Milestone Report (Figure 18) under the "actual" columns, actual outputs and hours per each objective in a program category; and actual costs for each program.

FIGURE 25: GUIDANCE COUNSELOR

PROFESSIONAL DEVELOPMENT AND PLANNING RECORD

Last Name First M.I. ____ Grade Level ____ Date ____

School ____ Name of Reviewer ____ Position ____

Directions: Counselor Completes Parts I through III.

I. COUNSELOR'S STATEMENT OF OBJECTIVES:

Short Term (one year or less) ____

Long Term (two to five years) ____

II. PERSONAL DEVELOPMENT GOALS FOR PAST SCHOOL YEAR

Description	Progress Made Toward Achievement

III. GOALS FOR THIS SCHOOL YEAR

Description	Plan For Achievement

Directions: All the remaining parts of the evaluation except for Part IX (see directions for Part IX) are to be completed first by the counselor, then by the reviewer, and then reviewed together and signed by both at the bottom of page 7.

For Parts IV through VIII, the following descriptions will help in using the evaluation scale:

FIGURE 25

OUTSTANDING (O) - Outstanding indicates extraordinarily high performance, leaving little, if anything to be desired. The individual performed in a clearly exceptional manner in both quality and quantity. Performance is consistently above requirements of the classification. Very little, if any, supervision or guidance is required in daily work. Outstanding persons should meet the ideal requirements for the classification.

VERY HIGH (VH) - Performance is high, but somewhat short of outstanding. Works very well with a minimum of supervision. Individuals in this category approach meeting the ideal requirements for the level at which work was performed.

GOOD (G) - The individual rated good meets the reasonable and usual expectations for performance. Work is performed in a wholly satisfactory manner.

BELOW NORMAL (BN) - Below normal rating indicates that assignments and responsibilities are not being handled as well as desired. Improvement is required to qualify for satisfactory performance of duties. Shortcomings may be due to lack of experience, talent, enthusiasm or training.

NOT APPLICABLE (NA)

PLEASE NOTE THAT "GOOD" IS THE TYPICAL OR NORMAL RATING DESCRIBING COMPLETELY SATISFACTORY WORK

IV. PERSONALITY

	Counselor					Reviewer				
	O	VH	G	BN	NA	O	VH	G	BN	NA
1. Physical Characteristics										
2. Emotional Stability										
3. Social Adjustment										
4. Professional Relationships										
5. Judgment										
6. Habits of Conduct										
7. ______________________										
8. ______________________										
	O	VH	G	BN	NA	O	VH	G	BN	NA
9. Summary										

Comments

COUNSELOR	REVIEWER

FIGURE 25

V. PREPARATION

	Counselor					Reviewer				
	O	VH	G	BN	NA	O	VH	G	BN	NA
1. Professional Attitudes										
2. Technical Knowledge & Skill										
3. Continuity of Professional Growth										
4. Subject Matter Scholarship										
5. Language Usage										
6. Civic Responsibility										
7. Dependability										
8. Appreciation and Ideals										
9. ____________________										
10. ____________________										
	O	VH	G	BN	NA	O	VH	G	BN	NA
11. Summary										

Comments

COUNSELOR	REVIEWER

VI. TECHNIQUE

	Counselor					Reviewer				
	O	VH	G	BN	NA	O	VH	G	BN	NA
1. Planning and Organization										
2. Individualization										
3. Classroom Generalship										
4. Manipulation of Materials										
5. Ability to Compromise										
6. ____________________										
7. ____________________										
	O	VH	G	BN	NA	O	VH	G	BN	NA
8. Summary										

FIGURE 25

Comments

COUNSELOR	REVIEWER

VII. PUPIL REACTION

	Counselor					Reviewer				
	O	VH	G	BN	NA	O	VH	G	BN	NA
1. Enthusiasm										
2. Power to Appraise										
3. Normal Development										
4. Expression										
5. Subject Matter Progress										
6. Habits and Thinking										
7. Habits of Conduct										
8. Attitude										
9. ____________________										
10. ____________________										
	O	VH	G	BN	NA	O	VH	G	BN	NA
11. Summary										

Comments

COUNSELOR	REVIEWER

VIII. OVERALL PERFORMANCE

Counselor					Reviewer				
O	VH	G	BN	NA	O	VH	G	BN	NA

FIGURE 25

IX. GUIDANCE ACTIVITIES SUMMARY

Directions: The first three columns of Part IX will be completed by the counselor and the reviewer soon after guidance objectives are selected by the counselors and principal for the whole school. The counselor and the reviewer (probably the principal) will decide together which parts of which objectives the counselor will be responsible for that year. The reviewer will then fill out the remainder of the form (similarly to the Program Milestone) with the planned output for that counselor for each objective, the actual output (at the time of the evaluation), and the difference.

			SCHEDULE YEAR-TO-DATE				
					DIFFERENCE		
OBJECTIVE DESCRIPTION	OBJECTIVE NUMBER	OBJECTIVE OUTPUT DESCRIPTION	PLANNED OUTPUT	ACTUAL OUTPUT	UNITS	PERCENT	COMMENTS
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							

FIGURE 25

X. LIST THE OUTSTANDING CONTRIBUTIONS THE COUNSELOR HAS MADE TO THE SCHOOL DURING THE YEAR.

COUNSELOR	REVIEWER

XI. WHAT ARE THE COUNSELOR'S STRONG POINTS?

COUNSELOR	REVIEWER

XII. IN WHAT AREAS COULD THE COUNSELOR IMPROVE?

COUNSELOR	REVIEWER

FIGURE 25

XIII. IMPROVEMENT PLAN

(How the counselor can improve his/her day-to-day performance.)

COUNSELOR	REVIEWER

XIV. IMPROVEMENT PLAN

(Final - to be developed jointly by counselor and reviewer at interview.)

SIGNATURES (to be signed at conclusion of interview):

Counselor ______________________________ Date ________________

Reviewer ______________________________ Date ________________

Director, Pupil
Personnel Services ______________________________ Date ________________

The Counselor has:

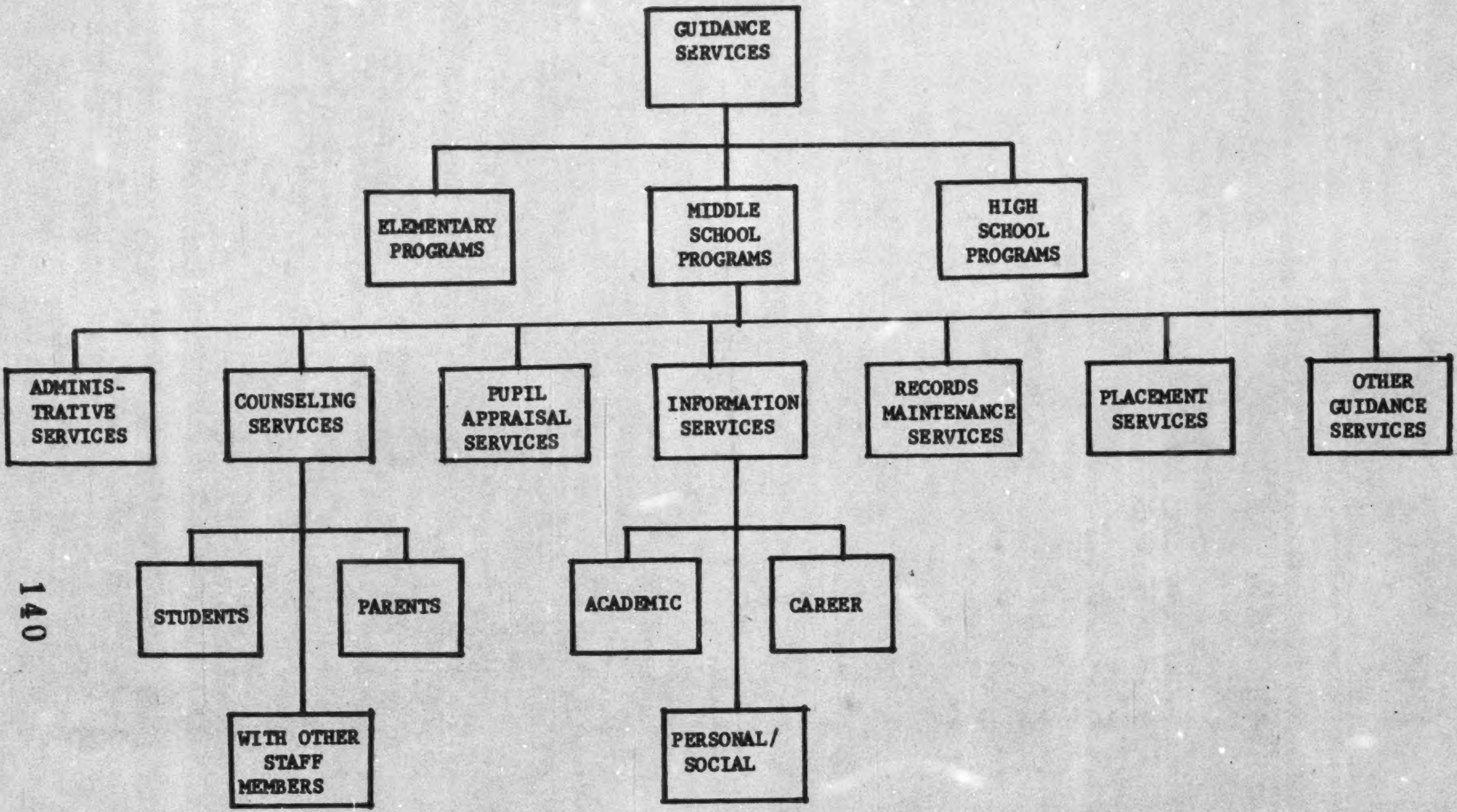
Pennsylvania Tenure ____Yes ____No

Employed by school ____years (including this school year).

This is 1 2 3 4 review for this counselor this school year.
(circle one)

BRISTOL TOWNSHIP SCHOOL DISTRICT

GUIDANCE PROGRAM STRUCTURE


GUIDANCE SERVICES
ELEMENTARY PROGRAMS
MIDDLE SCHOOL PROGRAMS
HIGH SCHOOL PROGRAMS
ADMINIS-TRATIVE SERVICES
COUNSELING SERVICES
PUPIL APPRAISAL SERVICES
INFORMATION SERVICES
RECORDS MAINTENANCE SERVICES
PLACEMENT SERVICES
OTHER GUIDANCE SERVICES
STUDENTS
PARENTS
WITH OTHER STAFF MEMBERS
ACADEMIC
CAREER
PERSONAL/ SOCIAL

BRISTOL TOWNSHIP SCHOOL DISTRICT

GUIDANCE GOALS
AND
OBJECTIVES FOR
ELEMENTARY, MIDDLE, AND HIGH
SCHOOL DIVISIONS

ELEMENTARY GOALS AND OBJECTIVES

District Goal: To provide guidance services as a continuous process and as an integral part of the entire educational program.

I. ACADEMIC LEARNING:

To act in conjunction with the instructional program and the learning process in order to make education meaningful, interesting and successful for every student.

A. To assist elementary students, teachers and parents in assessing and understanding the students' abilities, aptitudes, interest and educational needs.

1. To provide through Guidance Services the means for identifying the educational needs, abilities, and interests of elementary school students.

    a. The counselor will interview all students referred within three (3) working days in the building, as measured by counselor records.

    b. After interviewing the referred child, the counselor will meet with 100% of the teachers and 80% of the parents of those children referred within four (4) working days in that building as measured by counselor records. (It is expected that parent notification will be unnecessary in at least 20% of the cases.)

    c. 100% of the pupils at those levels designated by district policy will receive an achievement test battery in the fall of the year. This will be indicated by counselor record test results.

2. To provide students, staff, and parents with an interpretation of student data.

    a. Within two weeks of the receipt of the achievement test results, the counselor will provide teachers with class and individual results for their recording on individual profiles to be sent home to the parents.

    b. Within two weeks of the receipt of the test results, the counselor will discuss with the teachers, the results and the implications of the test results on the educational program of the children in their classes. This is to be measured by a summary report of the meetings to the principal and the participants.

c. Within one month of receipt of the standardized test results, the counselor will discuss school and grade level results with the principal so that he/she is aware of curricular implications which he/she can review with teaching and supervisory personnel, as measured by counselor's record of the meeting.

d. Within one month of receipt of the standardized test results, the counselor will follow up with each teacher for possible further evaluation and/or remedial help, those pupils scoring at or below the 10th percentile on the composite score as indicated by counselor records.

e. Within two months of receipt of the standardized test results, individualized interpretive conferences will be scheduled by the counselor with the parents of all pupils whose composite score is at the 10th percentile or lower. This will be verified by counselor records.

f. The counselor will present to the teachers, through the use of group meetings, the methods and available means of using supplementary developmental information to discover student educational needs. 50% of the teachers attenting these meetings will demonstrate their understanding by using this information on each referral sheet.

g. Each counselor will meet weekly with a group of volunteer teachers in a pilot group session so that these teachers can help each other to understand and utilize supplementary developmental information in their instruction. After four sessions, 100% of the participants will agree subjectively that this has enhanced their instruction.

B. To assist students in understanding their roles in creating plans, schedules, environment, and experiences which facilitate learning.

1. To encourage elementary students to develop the skills which will enable them to maximize their own learning.

a. By October 1, in an after-school meeting, the counselor and principal will introduce to primary teachers those published programs available in the school designed to develop in the child an understanding of his role and responsibilities in group situations. 60% of those teachers reached will be using one of the programs as determined by the principal's semi-annual review of lesson plans.

b. Within one week after the distribution of report cards, the counselor will request from the teachers a list of those students whose work is designated as failing in two or more subjects. Within two weeks of the receipt of the list the counselor will meet with each of these students individually or in small groups, for the purpose of helping them improve academically. This will be verified by counselor records.

C. To assure that pupils with special learning needs and problems receive the services that will meet these needs and problems.

   1. To cooperate with teachers and parents in identifying elementary students with special learning needs and/or problems and referring them for appropriate services.

      a. 100% of pupils with same learning problems referred to the counselor will be interviewed by the counselor and referred for additional evaluation or assistance within five work days of the referrals, as determined by the counselor's log.

      b. In June of each school year, the counselor will contact the Director of Pupil Personnel, or his designated representative, to review the appropriateness of the prior year's placements.

II. CAREER DEVELOPMENT:

To assist students to progress toward productive and rewarding careers.

A. To assist students to be aware of the world of work and its changing nature.

   1. To provide all elementary students with information which is illustrative of the various career clusters.

      a. By the end of the fifth level, 85% of the students will demonstrate that they can list correctly 10 of the 15 career clusters as established by HEW. They will also be able to describe three jobs under each of those 10 career clusters. The counselor will prepare and administer this test.

B. To assist students in assessing and utilizing their abilities, aptitudes, interests and educational needs in regard to career development.

   1. To assist elementary students to understand the relationships between abilities, aptitudes, interests and career choice.

      a. By the end of the 5th level, each student will be able to name a job or career holding interest for him or her and enumerate the requirements needed to enter this field as well as the characteristics necessary for a person to be successful in it.

C. To assist students and parents to become knowledgeable about the characteristics and objectives of available school courses as they relate to various career and vocational choices.

   1. To include elementary staff, pupils and parents in career awareness programs.

      a. In the fall of the year, the counselor with teachers and principal will plan, organize and coordinate at an after-school meeting, a one week career awareness unit which will include 100% of their pupils. All teachers will conduct career awareness activities as described by the principal's monthly report.

      b. The counselor will encourage 5th level parents by means of a letter so that at least 10% of the families will participate as role models in the career awareness program. Teachers will report to the counselor on the number of families involved in this activity at the end of the unit.

   2. To assist the student in understanding how school experiences relate to the working world.

      a. At the fourth level, after creative activity regarding characteristics of productive personages the teacher will encourage each child to rate himself on the following characteristics as manifested in his present relationships and performance in the classroom:

         ....desire to work, responsibility, dependability, adaptability, loyalty, respect for the dignity of all useful labor, pride in accomplishment, cooperation, appreciation of quality in workmanship. (This list adapted from Gardner Boyd.)

III. SOCIAL:

To help each elementary pupil in the understanding and acceptance of self and to appreciate and accept the worth and dignity of others.

A. To encourage the growth of a positive self-image in students.

   1. To assist elementary pupils in the development of positive self-perceptions.

      a. Through individual and group counseling activities the counselor will help promote a positive self-image in those children who were referred with a weakness in this area. At the time of the referral, a rating scale will be given to the teacher to determine the extent of poor self-image. Within one month of the referral, the counselor will provide to the referred child's teacher the same rating scale to help determine the improvement of the child's self perceptions. 20% of those items on the rating scale will show improvement.

B. To promote successful adjustment of students to the condition of their social and educational environment.

1. To develop in the elementary pupil the skills such as cooperation, compromise and communication needed for effective functioning with other pupils, teachers and parents.

   a. The counselor will conduct a workshop with teachers and principal at the November Election Day Workshop so that at least 50% of the teachers will conduct lessons uding the Pflaum Dimension of Personality Series or other programs designed for this purpose. This will be ascertained by principal observation of lesson plans.

C. To encourage students to understand and respect the individual differences among people.

1. To help the elementary child experience satisfaction from his relations with adults and other children.

   a. The elementary counselor through individual counseling, and the counselor along with the classroom teacher through group experiences, will provide to the child with inadequate social skills, experiences and techniques for improving his social interactions. This will be measured by a Likert weighted scale.

MIDDLE SCHOOL GOALS AND OBJECTIVES

District Goal: To provide guidance services as a continuous process and as an integral part of the entire educational program.

I. ACADEMIC LEARNING:

To act in conjunction with the instructional program and the learning process in order to make education meaningful, interesting, and successful for every student.

A. To assist students, teachers, and parents in assessing and understanding the student's educational needs in terms of their abilities, aptitudes, and interests.

1. To provide through Guidance Services the methods and procedures for identifying the educational needs of middle school students.

    a. The middle school Guidance Department will develop by November of each year a testing schedule for all sixth and eighth grade students. Schedule to be turned over to building principal.

    b. The middle school Guidance Counselors will administer the Iowa Test of Basic Skills to all sixth and eighth grade students on the dates listed in the district testing schedule. Counselor records will reflect number of student's test.

    c. Through the use of the Iowa Test Scores, teacher evaluations, and student achievement the Middle School Guidance Counselors will determine the students' educational needs by the deadline set by the district schedule. Completions of course coding of students will determine completion of activity.

    d. Using previous student records and current testing results the Middle School Guidance Counselors will properly place new entrants to the Middle School within a week of the student's arrival. Can be measured through teacher feedback to guidance counselor, counselor records will reflect this feedback.

2. To provide students, staff, and parents with an interpretation of student data.

    a. Within thirty days of the return of all test results and through small group discussions, all sixth and eighth grade students will receive from their counselor an interpretation of their individual profile. Counselor records will reflect student contacts.

b. When individual counseling uncovers significant differences between pupil test results and expectations, the guidance counselor will schedule, at times mutually convenient to parents and counselors, all parents of the students thus identified. Counselor's record will reveal number of parents contacted and scheduled.

B. To assist students in understanding their roles in creating plans, schedules, environment, and experiences which facilitate learning.

1. To help middle school students understand how curricular and co-curricular programs can facilitate their plans and learning experiences.

   a. Before the end of the fifth year, all fifth grade students will receive in their home school a description of the Middle School program by an orientation team composed of guidance personnel and students from the receiving middle school. Orientation meetings held will be recorded on counselor's record.

   b. Before the end of the fifth year, and according to a schedule arranged by administrators and counselors, all fifth grade classes will have visited the Middle School they will attend during their sixth year in school. Will be measured by a counselor's attendance record of fifth grade classes.

   c. By the end of the school year, all students will be counseled individually on their curricular and co-curricular program at least once each year by the guidance counselor to whom they are assigned. Counselor records will reflect number of students counselled.

   d. After an orientation by High School personnel and the eighth grade guidance counselor on the ninth grade program and course selection procedures, all eighth grade students will complete their course selection cards within six weeks of the orientation program. Counselor's records will show completion of this activity.

2. To provide the middle school students with knowledge of the limits and scope of the environmental experiences associated with his schedule.

   a. Scholastic counseling for any middle school student who requests it, or who is referred to the guidance counselors, will occur within three days of the request or referral. Counselor records will reflect student contacts.

C. To assure that pupils with special learning needs and problems receive the services that will meet these needs and problems.

1. To increase staff involvement in the identification of middle school students having special learning needs and problems.

a. In order to make staff aware of pupil characteristics that identify pupils with special learning needs, guidance counselors will initiate, at the beginning of each semester and at mutually convenient times, grade level meetings. Counselor's records will reflect the time and number of meetings.

2. To assure using available data that middle school students with special learning needs and problems receive appropriate referrals and placement.

a. Within one month of initiating action to obtain test data, psychological evaluations, and teacher anecdotals, on students identified as having special problems, staff will complete a diagnosis on referred students. Number of students reflected in guidance counselor records.

b. One week after verification by a staff committee, a parent of a student with special learning needs will be counselled by appropriate staff personnel. Staff committee records will reflect number of parents counselled.

c. Within two months of initiating action that obtains parental approval, the guidance counselor will schedule the student with special needs into the appropriate and available program. Number of students assigned will be reflected in the rosters of special programs.

II. CAREER:

To assist students to progress toward productive and rewarding careers.

A. To assist students to be aware of the world of work and its changing nature.

1. To provide all middle school students with information that illustrates the variety of occupations.

a. As an ongoing process, the guidance department will develop, as part of their counselling program, a library of resource materials that will illustrate the variety of occupations available in the world of work. To be accounted for through a card catalog system maintained by librarian.

b. The school librarian will make all sixth grade students aware of the Career Guidance Information Center during the sixth grade library orientation program. Librarian orientation schedule will verify that all classes were met.

c. The guidance personnel will, by establishing an organized program for disseminating career information, bring all sixth, seventh, and eighth grade students in contact with information dealing with occupations before leaving the middle school. Counselor records will reflect student contacts.

2. To make middle school students aware of the current trends and factors that cause changes in characteristics of occupations.

a. Guidance personnel will establish, as part of their yearly operating budget, the means for updating materials on occupations. Will be accounted for through a card catalog system maintained by librarian.

b. During the student's middle school career in order to stress the current trends and factors that cause changes in characteristics of occupations, the guidance counselor will prescribe a career information program for all students. Guidance counselors will maintain a record of all student contacts made for this purpose.

B. To assist students in assessing and utilizing their abilities, aptitudes, interests, and educational needs in regard to career development.

1. To explore the areas of work available to students considering their particular interests.

a. Before the students leave the middle school the guidance counselor will administer to every student a group interest inventory. This will be accounted for in the guidance department testing schedule.

b. Within five days after receiving the results of the interest inventory the middle school guidance counselor will help all middle school students identify the relationship of student interest to career choices. Student contacts will be reflected in guidance counselor record.

2. To assist middle school students in making realistic occupational choices based upon abilities, aptitudes, and interests.

a. Prior to completion of their course selection cards, all eighth grade students will be counseled individually on the relationship that exists among occupations, student abilities, aptitudes and interests; and student course selection. Completion of selection card verifies this objective.

C. To assist students and parents to become knowledgeable about the characteristics and objectives of available school courses as they relate to various career and vocational choices.

1. To increase the middle school students' awareness of how his school experiences affect his future occupational choices.

   a. After completing a career counseling program involving personnel directors, college admissions officers, officers of professional organizations, and union officials, middle school pupils will be able to:

      . complete job application forms;

      . identify job requirements of specific jobs;

      . draw a self awareness profile; and

      . identify job clusters.

   b. Students will be asked to demonstrate competence in areas listed.

2. To enlist the aid of parents in helping their child to make proper course selections to meet future career goals.

   a. Prior to April 1 on each year and in order to provide all parents of eighth grade students with information that will enable them to counsel their children on course selections, the guidance department will design a packet of parents containing:

      . test information;

      . a course selection booklet and four year plan;

      . a listing of ninth grade courses; and

      . instructions for arranging parent conferences.

      Material to be included in the packet will be verified by the building principal.

   b. Prior to March 1, and through the use of parent meetings, student couriers, and mailings, the guidance department will deliver course selection packet to all parents. Delivery will be verified through check list maintained by guidance department.

III. SOCIAL

To help each student in the understanding and acceptance of self and to appreciate and accept the worth and dignity of others.

A. To encourage the growth of a positive self-image in students.

   1. To provide middle school students with the experiences that will make them aware of their individual personality.

      a. At the completion of a Group Guidance Personality Program 80% of the middle school students will be able to:

         . identify at least five personality traits;

         . recognize their own personality traits;

         . recognize personality traits of others; and

         . assess the effects of the environment on their personality.

      b. Students will be asked to demonstrate competence in areas above.

   2. To provide the individual middle school students with opportunities to identify their positive personality traits.

      a. For the purpose of reinforcing the positive personality traits of all middle school students and using data listed in Group Guidance Personality Program, the guidance counselor will counsel each individual student before leaving the middle school. Student contacts will be reflected in counselor records.

B. To promote successful student adjustment to the conditions of their social and educational environment.

   1. To provide middle school staff with information that will increase the social awareness of their students.

      a. Within one year of establishing the sources and availability of materials, the guidance department will design a clearing house service for all appropriate curriculum materials and programs dealing with social awareness. The completion of the objective will be verified by the building principal.

b. The guidance department will use various means, (such as: staff meetings, department chairmen meetings, memos and newsletters) to make staff aware of materials dealing with social awareness. Number of meetings verified in the monthly report to the building principal.

c. The guidance department will establish a monthly calendar for the use of all social awareness materials requested. The calendar will serve as a record for completion of objectives.

2. To promote in the middle school students the attitudes needed for effective functioning with other pupils, teachers, and parents.

   a. Within three days of receiving a referral or request for counseling, the middle school guidance counselor will counsel with all the students having social awareness problems. Student contacts reflected in the guidance counselor's records.

   b. Where counseling indicates the need for social awareness among groups of students the guidance counselor will organize group counseling sessions within one week of the identification of the problem. Guidance counselor's sessions will be verified through counselor records.

   c. Within one week of receiving psychological reports, administrative reports, and teacher anecdotals, that identify students with possible personality problems, the guidance counselors will make the building principal aware of these individuals.

   d. Following the identification of referred students with personality problems, counselors will:

      1) Counsel all students. Student contacts verified by guidance counselor records.

      2) Determine appropriate remedial actions for all students identified as having personality problems. Statement of proposed action submitted to building principal.

   e. Within two weeks after remedial action has been initiated, the counselors will schedule students for a follow-up counseling session verified through counselor records.

C. To encourage students to understand and respect the individual differences among people.

1. To provide counseling whenever conflict arises out of lack of student understanding for individual differences.

   a. Using information gathered through conferences with staff, parents, and students the middle school guidance counselor will identify, as soon as possible, the potential for conflicts among students. Names of persons so identified will be forwarded to appropriate building administrator.

   b. After identifying potential conflicts among students, and in order to insure the resolution of the conflicts the middle school guidance counselor will establish, within one day, a schedule for counseling the individuals involved. The schedule will verify completion of objective.

   c. In consulting with the middle school guidance counselor, the building principal will establish immediately a course of action for those conflicts not resolved by individual counseling. Student record will verify action.

   d. Before the opening of the 1976/1977 school year the middle school counselors, working with the administrative staff and teachers will develop a plan for handling spontaneous conflicts arising out of the differences among students. This plan will become part of teacher handbook.

2. To provide teachers with information applicable to helping students understand situations arising from their interactions.

   a. As soon as the potential student conflicts are identified, using the information gathered from sources listed in the objectives under goal C-1, the guidance counselor will identify these potential conflicts for teachers. Guidance counselor records will indicate number of teacher contacts.

   b. As soon as middle school guidance counselors are aware of the reasons for possible personality conflicts, the counselor will explain to the teacher the possible effects of this information on the classroom situation. Guidance counselor records will indicate number of teacher contacts.

HIGH SCHOOL GOALS AND OBJECTIVES

District Goal: To provide guidance services as a continuous process and as an integral part of the entire education program.

I. ACADEMIC LEARNING:

To act in conjunction with the instructional program and the learning process in order to make educational meaningful, interesting, and successful for every student.

A. To assist high school students, teachers and parents in assessing and understanding the students in terms of their abilities, aptitudes, interests, and educational needs.

1. To provide a program of assessment of high school students' abilities, aptitudes, interests and educational needs.

a. The high school guidance department will develop by September of each year a testing schedule for all ninth, tenth and eleventh grade students. The schedule will appear on the principals' school calendar.

b. By December of each students' ninth grade year, counselors will have administered an aptitude test battery to at least 80% of the members of the ninth grade class, as measured by the number of completed answer sheets.

c. By January of each students' eleventh grade, counselors will have administered an aptitude test battery/career planning questionnaire to at least 80% of the members of the eleventh grade, as measured by the number of completed answer sheets.

d. By April of each students' tenth grade year, counselors will have administered an interest inventory to at least 80% of the members of the tenth grade class, as measured by the number of completed answer sheets.

e. By the middle of October all junior homerooms will have been informed by counselors of the nature and value for college bound students of the PSAT/NMSQT. These activities will be reported in the department chairman's October monthly report.

f. Throughout the school year one month before the regular registration deadlines of the national college admission testing programs, all juniors and seniors will be notified of pending test dates, registration procedures and other information related to the CEEB, SAT, and ACH, the ACT and Advanced Placement Tests, and "CLEP." The schedule of notification will be placed on the guidance master schedule of events.

g. By the end of each year a counselor will have made arrangements for all 12th grade students to have been given preliminary information regarding the Armed Services Vocational Aptitude Battery, for administration of the test to those students interested, and for interpretation of test results. This will be reported on the department chairman's monthly report to the principal.

*h. On the day a new student enters the high school from another district, a member of the guidance staff will administer an intelligence test and a reading test, these tests to be hand scored by a counselor prior to planning a class schedule. This will be measured by counselors' records.

i. In 100% of the cases as the need becomes apparent during counseling sessions throughout the year to know more about a student's abilities, aptitudes, interests and needs, counselors will administer and/or refer the high school student for appropriate testing. This will be measured by counselors' records.

2. To provide students, staff and parents with an interpretation of the high school students' collected data.

a. The high school counseling staff will meet monthly formally or informally with all department chairmen, teachers, and supervisors for the purpose of providing information about student and parent reactions to and comments concerning course content and methods of instruction. This will be reported on each counselor's monthly report to his chairman and on the chairman's monthly report to the principal.

b. Within sixty days of the return of all test results, all ninth, tenth, and eleventh grade students will receive from their counselor an interpretation of their test results in the form of an individual profile. This will be reported on each counselor's monthly report to his chairman and on the chairman's monthly report to the principal.

c. All requests from parents and teachers and students for interpretations of standardized test results will be scheduled by guidance counselors at an in-school location within a period of one week after initial contact. This will be recorded in each counselor's appointment log.

d. By September preceding each school year the high school guidance department, in cooperation with the school administration, will inform parents of the testing schedule and

---

*Paraprofessional

will encourage them to schedule appointments to discuss the interpretation of the test results. This communication will be placed in the student handbook and on the school calendar.

B. To assist students in understanding their roles in creating plans, schedules, environment, and experiences which facilitate learning.

1. To provide students with the information necessary to plan their educational programs.

   a. By November 1st each counselor will have met with 90% of his/her ninth and tenth grade counselees in a group guidance setting to discuss academic plans, schedule and guidance and counseling services available. The schedule will appear on the principal's school calendar and the master guidance schedule.

   b. By the end of the school year each counselor will have provided through individual counseling sessions assistance to 50% of his/her eleventh grade counselees in the selection of programs or classes appropriate for the student's life goals by helping them relate their previous school records, test scores, abilities, achievement, work and life experiences to their expressed feelings and ambitions. Will be reflected in the counselor's roster of counselees.

   c. By the end of each students' senior year, through individual counseling sessions each counselor will have provided assistance to 90% of his/her twelfth grade counselees in post-high school planning appropriate for their life goals by helping them relate their expressed feelings and ambitions. Will be reflected in the counselor's roster of counselees.

   d. By the end of July of each school year the records of 100% of the juniors will have been evaluated and updated by the guidance department staff for purpose of determining course requirements to be completed prior to graduation. Information will be recorded in the master credit evaluation book.

   e. By the end of September the parents of each senior who is in danger of not meeting graduation requirements will be notified of his/her deficiencies. Information recorded in master credit evaluation book with list of names part of chairman's file and carbon copy in the student's file.

   f. By the end of September of each school year 100% of the seniors who are in danger of not meeting graduation requirements will have had their rosters revised in an attempt to meet these requirements. Measured by the first report card listing of courses and credits.

g. During the school year the counselors will make themselves available within five days of a request to meet with any student who seeks assistance with academic problems. This will be measured by counselor's log book.

h. In 100% of the cases throughout the year, the counselors will make schedule adjustments to meet the educational needs of the students (i.e., Work Experience, level changes, Tech placements, "major" changes), as determined during counseling session. This will be recorded in each counselor's appointment log.

C. To assure that pupils with special learning needs and problems are offered the services that will meet these needs and problems.

1. To encourage and cooperate with the staff in the identification and appropriate referral of high school pupils with special learning needs.

a. By the end of October each school year counselors will review with the entire high school faculty the methods of identifying students with special learning needs. This will be done through participation in department meetings and recorded in the chairman's monthly report.

b. Within two weeks of receiving a referral from a teacher, the high school counselor will do the following: promptly evaluate the material presented and if warranted see the student; consult with the parents; consult with the teachers having contact with the student; and make an appropriate referral if warranted.

c. In 90% of the cases, within five work days the counselor and teacher will have communicated as to the disposition of the referral. Process will be recorded in the counselor's log.

D. To involve parents of high school students with special learning needs in the referral process.

1. In 100% of the cases counselors and parents will confer at the beginning of the referral process for the purpose of acquiring a fuller understanding of the students needs and to discuss a course of action. Process will be recorded in the counselor's log.

II. CAREER:

To assist students to progress toward productive and rewarding careers.

A. To assist students to be aware of the world of work and its changing nature.

1. To provide students with opportunities to become acquainted with the current occupational trends.

    a. At least three times every school year each counselor will be provided with professional leave to keep abreast of services offered for students by agencies, organizations, businesses and industries. (Incorporate procedure for professional day). This will be reflected by the completed and approved professional leave form.

    b. The guidance department will develop and maintain a career guidance center containing current multi-media information related to career and job opportunities during and beyond high school for the use of all high school students.

    c. By December 1st of each school year 100% of the students will have been made aware of the existing career guidance program through multi-media presentations. The schedule will appear on the principal's school calendar.

B. To assist students in assessing their abilities, aptitudes, interests and educational needs in regard to career development.

1. To interpret to students information concerning their abilities, aptitudes, interests and educational needs as it relates to career development.

    a. By May of each students' ninth grade year counselors will have met with all homeroom groups to discuss the results of the DAT as they relate to the students' career aspirations. This will be reported on the department chairman's monthly report to the principal.

    b. By May of each tenth graders school year counselors will have met with all homeroom groups to discuss the results of the OVIS and how interests relate to career exploration and planning. This will be reported on the department chairman's monthly report to the principal.

    c. By April of each students' eleventh grade year counselors will have met with all homeroom groups to discuss the results of the DAT/Career Planning Questionnaire and how interests relate to career exploration and planning. This will be reported on the department chairman's monthly report to the principal.

    d. By the end of each students' senior year, through individual counseling sessions each counselor will have provided assistance to 90% of his/her twelfth grade counselees in career planning appropriate for their life goals by helping them relate their previous school records, test scores, abilities, achievement, work and life experiences to their expressed feelings and ambitions. This will be recorded in each counselor's appointment log.

C. To assist students and parents to become knowledgeable about the characteristics and objectives of available school courses as they relate to various career and vocational choices.

   1. To inform students and parents of the relationship of school courses to career and vocational choices.

      a. The high school guidance department will develop by September of each year a testing schedule for all ninth, tenth, and eleventh grade students. This schedule will appear on the principal's school calendar yearly.

      b. By April of each school year all counselors will communicate with 100% of the parents of high school students information regarding the relationship of school courses to post high school careers. This information is contained in course selection booklet given to all students.

      c. By May of each year, counselors will have assisted all department chairmen in the development of a system for the acquisition and integration of career guidance materials into the instructional program within each subject area. This will be reported on the department chairman's monthly report to the principal.

III. SOCIAL:

To help each student in the understanding and acceptance of self and to appreciate and accept the worth and dignity of others.

A. To encourage the growth of a positive self-image in students.

   1. The counselor will provide services to students in an atmosphere of acceptance.

      a. In 100% of referrals the counselor will aide the student in improving his self-image as measured by a pre and post-counseling teacher anecdotals.

   2. The counselor will work with the teachers to accomplish his goal.

      a. The counseling staff will provide strategies and activities for classroom use by teachers that can be used in developing a positive self-image in students. This will be accomplished via an annual in-service meeting.

B. To promote successful adjustment of students to the condition of their social and educational environment.

   1. To develop in the student the skills needed for effective functioning with other pupils, teachers, and parents.

a. From referrals, at least two counseling groups will be formed each school year to assist students to adjust to immediate problems and to learn methods of dealing with future problems. Adjustment will be measured through pre-activity interview and post-activity questionnaire. It is expected that at least 75% of the students will evidence growth in adjustment.

b. By February 1st of each school year 100% of the students will have been aware of the availability of multi-media materials designed to help develop student skills in handling relationships with parents, teachers, and other students. This will be reported on the department chairman's monthly report to the principal.

2. To provide faculty with information and skills that will promote student adjustment.

a. In 100% of the cases, counselors will provide to teachers' who request it, information applicable to understanding and solving situations arising from their social interaction. This will be recorded in each counselor's appointment log.

b. Counselors will maintain a library of information pertinent to this topic and will annually send a written bibliography to teachers.

C. To encourage students to understand and respect the individual differences among people.

1. To facilitate activities which stimulate student interaction.

a. In 100% of the cases where a student has sought help with the understanding and acceptance of self, the student and counselor will move into the area of learning more about individual differences.